



# **CMS Enterprise Identity Management (EIDM)**

## **User Guide**

**Working Copy Version 0.2 Release 16 Final**

Note: Working Copy versions delivered to the client for review will be published as a Major Version.

Client has agreed to review these documents as as-is, ongoing, “work-in-process” drafts and working copy versions.

Revision: January 2017

**This page is intentionally blank.**

# Table of Contents

<b>1. INTRODUCTION .....</b>	<b>1</b>
What is EIDM? .....	1
What is the “EIDM User Guide”? .....	1
<b>2. BEFORE YOU BEGIN .....</b>	<b>2</b>
Verify Your Computer Settings.....	2
What You May Need Before You Begin .....	3
<b>3. REGISTERING FOR THE PORTAL.....</b>	<b>4</b>
<b>4. LOGGING IN .....</b>	<b>10</b>
<b>5. REQUESTING ACCESS .....</b>	<b>13</b>
The Application Access Catalog.....	14
Access Catalog Features.....	15
How to Request a Role.....	16
<i>To request a role for one of the applications listed below .....</i>	<i>16</i>
To request a role for one of the applications listed below: .....	22
How to Cancel a Pending Role Request .....	27
<i>To cancel a role for one of the applications listed below: .....</i>	<i>29</i>
Identity Verification .....	32
Identity Cannot be Verified.....	36
Multi-Factor Authentication (MFA) Registration .....	37
Optional Multi-Factor Authentication (MFA).....	41
<b>6. CHECKING THE STATUS OF A PENDING REQUEST.....</b>	<b>42</b>
<b>7. VIEWING AND CHANGING YOUR ACCESS.....</b>	<b>44</b>
How to View/Modify Your Business Contact Information .....	44
How to View/Modify Your Existing Role Information .....	47
<i>Viewing Your Role Information .....</i>	<i>47</i>
<i>Adding an “Attribute” to Your Role.....</i>	<i>49</i>
<i>Removing an “Attribute” from Your Role .....</i>	<i>51</i>
How to Replace an Existing Role with Another Role.....	54
How to Remove a Role.....	54
How to Add a Role.....	57
How to Unlock Your Account .....	60
<b>8. CHANGING YOUR USER PROFILE .....</b>	<b>63</b>
Forgot Your User ID? .....	63
Forgot Your Password? .....	65
How to View Your Profile .....	68
How to Change Your Password .....	69
How to Change Your E-mail Address.....	71
How to Change Your Security Challenge Questions and Answers .....	73
How to Change Your Phone Number .....	75
How to Change Your Address.....	78

9. USER INITIATED ANNUAL CERTIFICATION .....	80
10.ACCOUNT REVIEW.....	81
<i>Account Fails Review at 180 Days</i> .....	81
<i>Account Fails Review at 360 Days</i> .....	82
11.APPENDICES.....	84
Appendix A: Accessing EIDM in 508 Accessibility Mode .....	84
Appendix B: Application Help Desk Information .....	86
Appendix C: Acronyms .....	89

## List of Tables

TABLE 1: ACCOUNT REVIEW CHECKS .....	81
TABLE 2: APPLICATION HELP DESK INFORMATION.....	88
TABLE 3: ACRONYMS .....	91





# EIDM User Guide

## 1. Introduction

---

The Centers for Medicare & Medicaid Services (CMS) is a federal agency that ensures health care coverage for more than 100 million Americans. CMS administers Medicare and provides funds and guidance for all of the 50 states in the nation, for their Medicaid programs and Children's Health Insurance Program (CHIP). CMS works together with the CMS community and organizations in delivering improved and better coordinated care.

### **What is EIDM?**

CMS has established the Enterprise Identity Management (EIDM) system to provide our Business Partners with a means to apply for, obtain approval, and receive a single User ID they can use to access one or more CMS applications.

### **What is the "EIDM User Guide"?**

This EIDM User Guide provides step-by-step instructions on how to register in EIDM, how to obtain access to an application and request a role, and how to manage your user profile.

## 2. Before You Begin



Before accessing the application, consider certain computer settings to ensure it functions properly.

To optimize your EIDM system access, check the following items:

1. **Screen Resolution:** CMS screens are designed to be viewed at a minimum resolution of 800 x 600. Your resolution is the number of pixels your monitor displays horizontally and vertically and is generally expressed as width times height (e.g., 800 pixels wide x 600 pixels high or 800 x 600). The more pixels that display, the better your on-screen text and images will look.
2. **Plug-Ins:** Verify that your computer has the latest version of JAVA and ActiveX installed.

### Note

Verify the latest versions of JAVA or ActiveX by going to the JAVA website ([www.java.com](http://www.java.com)) and Adobe website ([www.adobe.com](http://www.adobe.com)), or by contacting your internal IT Help Desk.

3. **Pop-up Blockers:** Verify that your browser's pop-up blockers are disabled.
4. **Supported Browsers:** EIDM supports Internet Explorer 11, Firefox, Google Chrome, and Safari.

As part of getting started, please review the following procedures:

1. How to verify your Computer Settings.
2. What you may need before you begin.

If needed, please refer to [Appendix A: Accessing EIDM in 508 Accessibility Mode](#).

## Verify Your Computer Settings

This section outlines the steps to verify your computer settings.

Action	
<b>Step 1</b>	<p>Verify your screen resolution.</p> <p><b>Windows 7 and 8:</b></p> <p>Select the <b>Start</b> button, select <b>Control Panel</b>, find <b>Appearance and Personalization</b>, and select <b>Adjust Screen Resolution</b>. Ensure the correct monitor is selected in the <b>Display</b> drop-down list. Below that list, the <b>Resolution</b> drop-down list displays your setting. Note this setting and select <b>Cancel</b> to leave your settings as they are.</p>
<b>Step 2</b>	<p>Install the latest version of JAVA and ActiveX.</p> <p><b>JAVA:</b></p> <p>Open your browser, navigate to <a href="http://java.com">java.com</a>, select <b>Free Java Download</b>, select <b>Agree and Start Free Download</b>, open the download, accept the terms, and select <b>Install</b>, select <b>Next</b>, wait for the program to install, and select <b>Close</b>.</p> <p><b>ActiveX:</b></p> <p>Open your browser, navigate to <a href="http://get.adobe.com/flashplayer">get.adobe.com/flashplayer</a>, select <b>Adobe® Flash® Player system plug-in</b>, select <b>Install Now</b>, open the download, select <b>Run</b>, accept the terms, and select <b>Next</b>, wait for the program to install, and select <b>Finish</b>.</p>

	Action
<b>Step 3</b>	<p>Disable your browser's pop-up blockers.</p> <p><b>Internet Explorer 11:</b></p> <p>Open your browser, select the <b>Tools</b> icon, select <b>Internet options</b>, open the <b>Privacy tab</b>, uncheck the <b>Turn on Pop-up blocker</b> checkbox, and select <b>OK</b>.</p> <p><b>Firefox:</b></p> <p>Open your browser, select the <b>Menu</b> icon, select <b>Content</b> in the navigation pane, find the <b>Pop-ups</b> section, and uncheck the <b>Block Pop-up windows</b> checkbox.</p> <p><b>Chrome:</b></p> <p>Open your browser, select the <b>Menu</b> icon, select <b>Settings</b>, select <b>Show Advanced Settings</b>, find the <b>Privacy</b> section, select <b>Content Settings</b>, find the <b>Pop-Ups</b> section, select <b>Allow all sites to show pop-ups</b>, and select <b>Done</b>.</p> <p><b>Safari:</b></p> <p>Open your browser, select the <b>Safari</b> button, select <b>Preferences</b>, open the <b>Security</b> tab, find the <b>Web content</b> section, and uncheck the <b>Block pop-up windows</b> checkbox.</p>

## What You May Need Before You Begin

Prior to requesting access, you should have received instructions from your organization or CMS contact. They should include application-specific information you may need to complete the request, such as:

- Social Security Number (SSN) / Taxpayer Identification Number (TIN)
- Legal Business Name (LBN) or Organization
- Application Name & Application Role
- Other information specific to your application, for example, Contract Number, Gentran Mailbox, National Provider Identifier (NPI), Organization number.
- You will have to create a User ID and password of your choosing if you do not already have one. EIDM allows you to create a User ID up to 74 characters; however, some applications have restrictions on the number of characters, and special characters, you can have in the User ID you create. Check with your CMS point of contact to identify restrictions for your application.
- Not every CMS application requires the same information, so it is important to get the specifics directly from your organization or CMS contact.

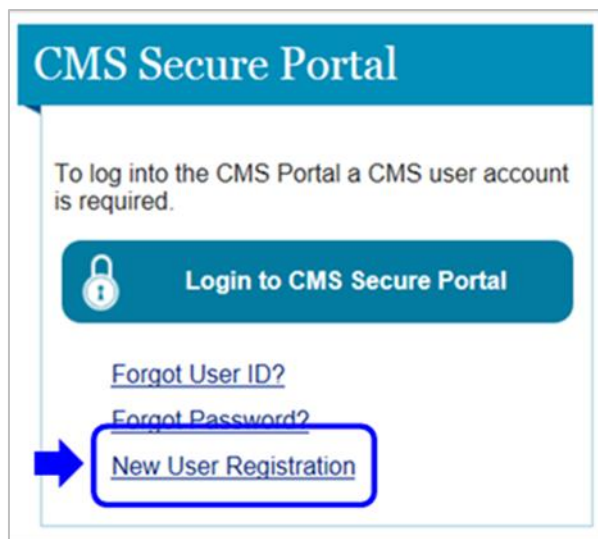
### 3. Registering for the Portal

This section provides information on how to register and create a user ID and password. The following are the basic step-by-step instructions.

- |               | Action                                                                                                                                         |
|---------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Step 1</b> | Navigate to <a href="https://portal.cms.gov">https://portal.cms.gov</a> . The <b>CMS Enterprise Portal</b> page displays as illustrated below. |



- |               |                                               |
|---------------|-----------------------------------------------|
| <b>Step 2</b> | Select the <b>New User Registration</b> link. |
|---------------|-----------------------------------------------|



## Action

**Step 3** Read the **Terms and Conditions**, select **I agree to the terms and conditions**, and then select **Next** to continue with the registration process.

**Terms and Conditions**

OMB No. 0938-1236 | Expiration Date: 04/30/2017 | [Paperwork Reduction Act](#)

**Consent To Monitoring**

By logging onto this website, you consent to be monitored. Unauthorized attempts to upload information and/or change information on this web site are strictly prohibited and are subject to prosecution under the Computer Fraud and Abuse Act of 1986 and Title 18 U.S.C. Sec. 1001 and 1030. We encourage you to read the [HHS Rules of Behavior](#) for more details.

**Protecting Your Privacy**

Protecting your Privacy is a top priority at CMS. We are committed to ensuring the security and confidentiality of the user registering to EIDM. Please read the [CMS Privacy Act Statement](#) which describes how we use the information you provide.

**Collection Of Personal Identifiable Information (PII)**

"Personal" information is described as data that is unique to an individual, such as a name, address, telephone number, social security number and date of birth (DOB).

CMS is very aware of the privacy concerns around PII data. In fact, we share your concerns. We will only collect personal data to uniquely identify the user registering with the system. We may also use your answers to the challenge questions and other PII to later identify you in case you forget or misplace your User ID / Password.

I have read the HHS Rules of Behavior (HHS RoB), version 2010-0002.001S, dated August 26 2010 and understand and agree to comply with its provisions. I understand that violations of the HHS RoB or information security policies and standards may lead to disciplinary action, up to and including termination of employment; removal or debarment from work on Federal contracts or projects; and/or revocation of access to Federal information, information systems, and/or facilities; and may also include criminal penalties and/or imprisonment. I understand that exceptions to the HHS RoB must be authorized in advance in writing by the OPDIV Chief Information Officer or his/her designee. I also understand that violation of laws, such as the Privacy Act of 1974, copyright law, and 18 USC 2071, which the HHS RoB draw upon, can result in monetary fines and/or criminal charges that may result in imprisonment.

The image shows a registration form with a light blue background. A blue arrow points to the left of the form. The form contains a checkbox labeled "I agree to the terms and conditions" which is checked. Below the checkbox are two buttons: "Next" and "Cancel". A blue arrow points to the "Next" button.

## Action

**Step 4** The **Your Information** page displays.

Provide the information requested on the **Your Information** page. The fields with an asterisk (\*) are required fields and have to be completed.

After all required information has been provided, select **Next** to continue.

**Note**

You may select **Cancel** at any time to exit out of the registration process. New information or changes entered do not save.

**Your Information**

Enter your legal first name and last name, as it may be required for Identity Verification.

\* First Name:

Middle Name:

\* Last Name:

Suffix:

Enter your E-mail address, as it will be used for account related communications.

\* E-mail Address:

Re-enter your E-mail address.

\* Confirm E-mail Address:

Enter your full 9 digit social security number, as it may be required for Identity Verification.

Social Security Number:

Enter your date of birth in MM/DD/YYYY format, as it may be required for Identity Verification.

\* Date of Birth:

☒ U.S. Home Address ☐ Foreign address

Enter your current or most recent home address, as it may be required for Identity Verification.

\* Home Address Line 1:

Home Address Line 2:

\* City:

\* State:

\* Zip Code:

Zip Code Extension:

Country: USA

Enter your primary phone number, as it may be required for Identity Verification.

\* Primary Phone Number:



Next

Cancel

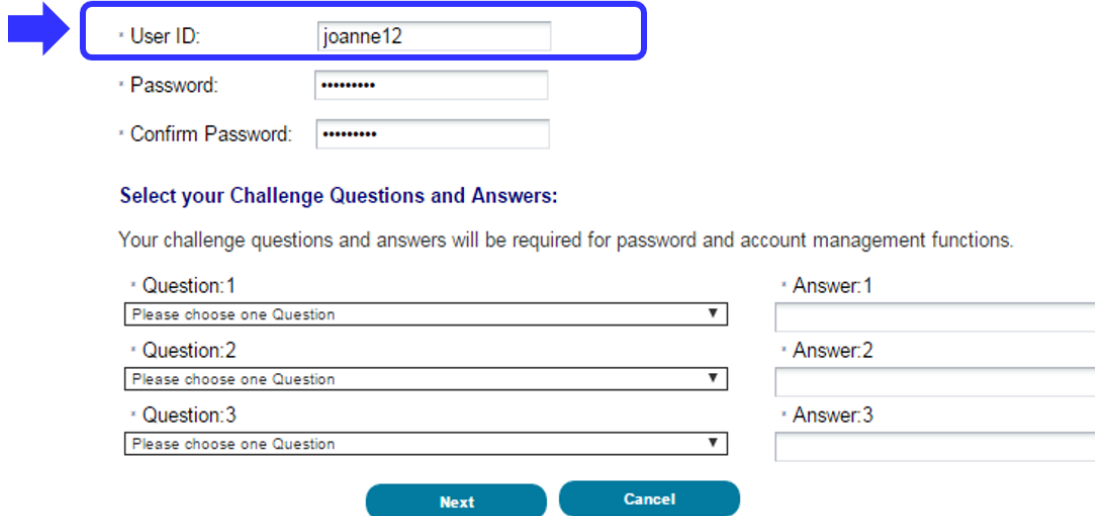
## Action

**Step 5** After providing the required information on the **Your Information** page, the **Choose User ID and Password** page displays.

Create and enter a user ID of your choice, based on the requirements for creating a user ID.

**Note**

EIDM displays instructions on what you are required to include in your user ID.

**Choose User ID And Password**


\* User ID:

\* Password:

\* Confirm Password:

**Select your Challenge Questions and Answers:**

Your challenge questions and answers will be required for password and account management functions.

\* Question:1

\* Question:2

\* Question:3

\* Answer:1

\* Answer:2

\* Answer:3

**Step 6** Create and enter a password of your choice. Enter the same password in the **Confirm Password** field.

**Notes**

- EIDM displays instructions on what you are required to include in your password.
- The passwords must match before you can continue.



## Action

## Choose User ID And Password

\* User ID:

\* Password:

\* Confirm Password:

## Select your Challenge Questions and Answers:

Your challenge questions and answers will be required for password and account management functions.

* Question:1 <input type="text" value="Please choose one Question"/>	* Answer:1 <input type="text"/>
* Question:2 <input type="text" value="Please choose one Question"/>	* Answer:2 <input type="text"/>
* Question:3 <input type="text" value="Please choose one Question"/>	* Answer:3 <input type="text"/>

Next

Cancel

## Action

**Step 7** After entering the user ID and password you have created, select a question of your choice in the **Select your Challenge Questions and Answers** section and enter the answer you want to be saved with the question.

Continue to select a question and enter an answer for Question 2 and Question 3.

Select **Next** to complete the registration process.

**Note**

You may select **Cancel** to exit out of the registration process. New information or changes entered do not save.

**Choose User ID And Password**

\* User ID:

\* Password:

\* Confirm Password:

**Select your Challenge Questions and Answers:**

Your challenge questions and answers will be required for password and account management functions.

\* Question:1  
Please choose one Question

\* Question:2  
Please choose one Question

\* Question:3  
Please choose one Question

\* Answer:1

\* Answer:2

\* Answer:3

Next

Cancel

**Step 8** The **Registration Complete** page displays and informs you that you should receive an e-mail that acknowledges your successful registration and includes your user ID.

Select **OK** to close the **Registration Complete** page.

**Registration Complete**

You have now successfully completed your registration to CMS Enterprise Identity Management (EIDM). You will receive an E-mail acknowledging your successful registration to EIDM and the E-mail will include your User ID.

Please wait 5 minutes before logging in. Selecting the 'OK' button will direct you to the CMS Portal Landing page.

OK

## 4. Logging In

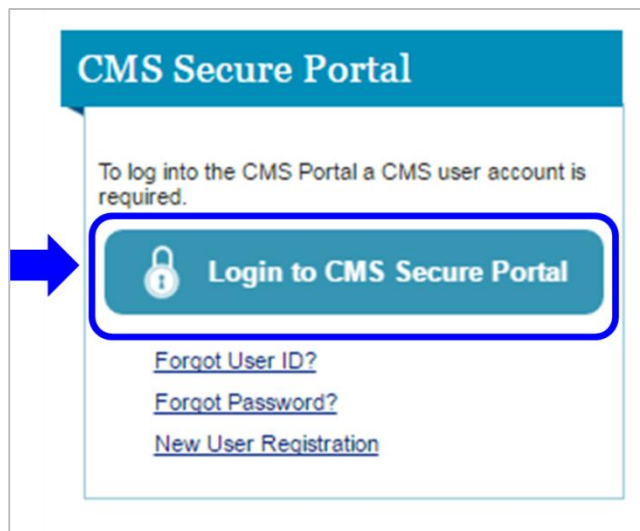
This section provides information on how to Login using your user ID and password. The following are the basic step-by-step instructions.

### Action

- Step 1** Navigate to <https://portal.cms.gov>. The **CMS Enterprise Portal** page displays as illustrated below.



- Step 2** Select **Login to CMS Secure Portal**.



**Step 3**

**Action**

Read the **Terms and Conditions** and select **I Accept** to continue.

Terms and Conditions

OMB No.0938-1236 | Expiration Date: 04/30/2017 | [Paperwork Reduction Act](#)


You are accessing a U.S. Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only.

Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.

By using this information system, you understand and consent to the following:  
 You have no reasonable expectation of privacy regarding any communication or data transiting or stored on this information system.  
 At any time, and for any lawful Government purpose, the government may monitor, intercept, and search and seize any communication or data transiting or stored on this information system.

Any communication or data transiting or stored on this information system may be disclosed or used for any lawful Government purpose.

To continue, you must accept the terms and conditions. If you decline, your login will automatically be cancelled.




I Accept

Decline


**Step 4**

Enter your **User ID** and select **Next** to continue.

Welcome to CMS Enterprise Portal



User ID



Next

Cancel

[Forgot User ID?](#)

Need an account? Click the link - [New user registration](#)

Action

**Step 5** Enter your **Password** and select **Log In**.

**Step 6** The system displays the **Welcome to CMS Enterprise Portal** page.

## 5. Requesting Access

This section provides basic step-by-step instructions and assistance on how to request access to an application and a role.

### Note

If you do not have a user ID and password, you have to register and create a user ID and password. Please follow the steps under **How to Register and Create a User ID and Password**.

Each application is different and may require you to enter or select information not indicated in the basic step-by-step instructions in this User Guide.

What if my application requires me to provide additional information that's not included in the basic step-by-step instructions?

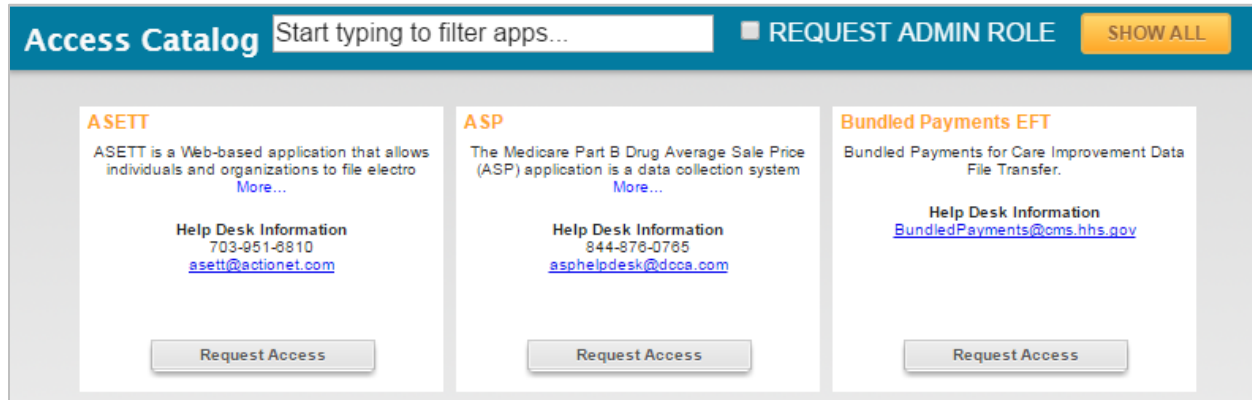
After following the instructions for **How to Register and Create a User ID and Password**, EIDM prompts you to enter or select any additional information needed, based on the application and role you are requesting. In addition, EIDM displays help messages to assist you in completing your requests.

### Note

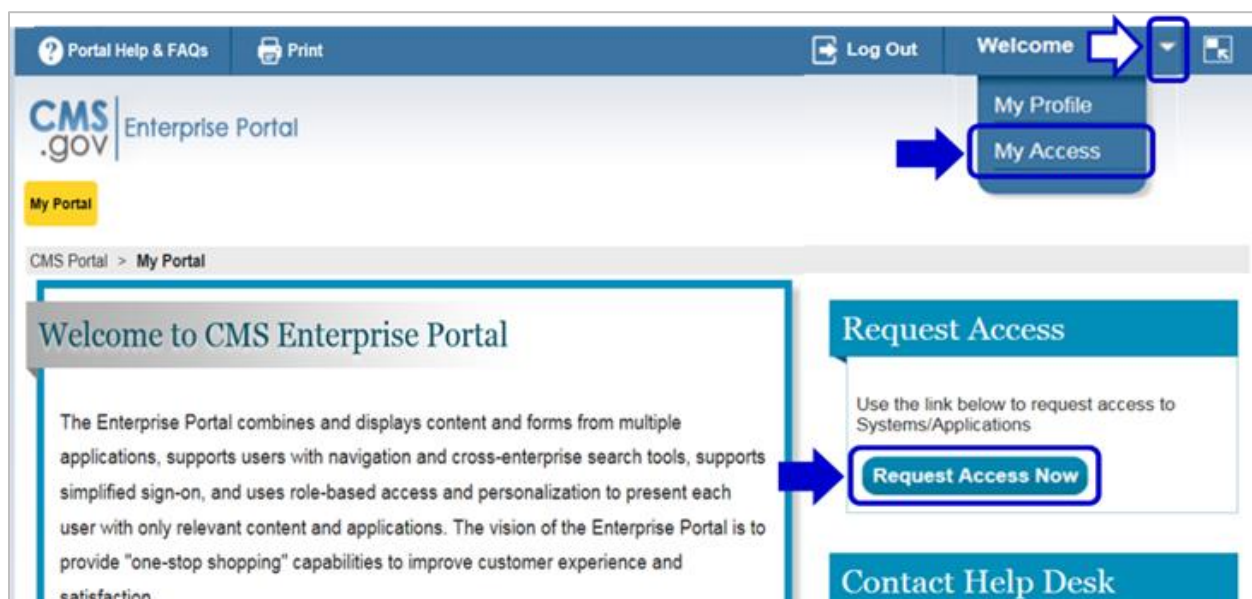
If you currently have a role in an application and you need to request access for another role in the same application, please follow the step-by-step instructions for [How to Add a Role](#)

## The Application Access Catalog

The application **Access Catalog** displays all the CMS applications that use EIDM services. Registered users who are logged into EIDM can use the catalog to request access to applications and select from a number of additional options that are described in more detail below.



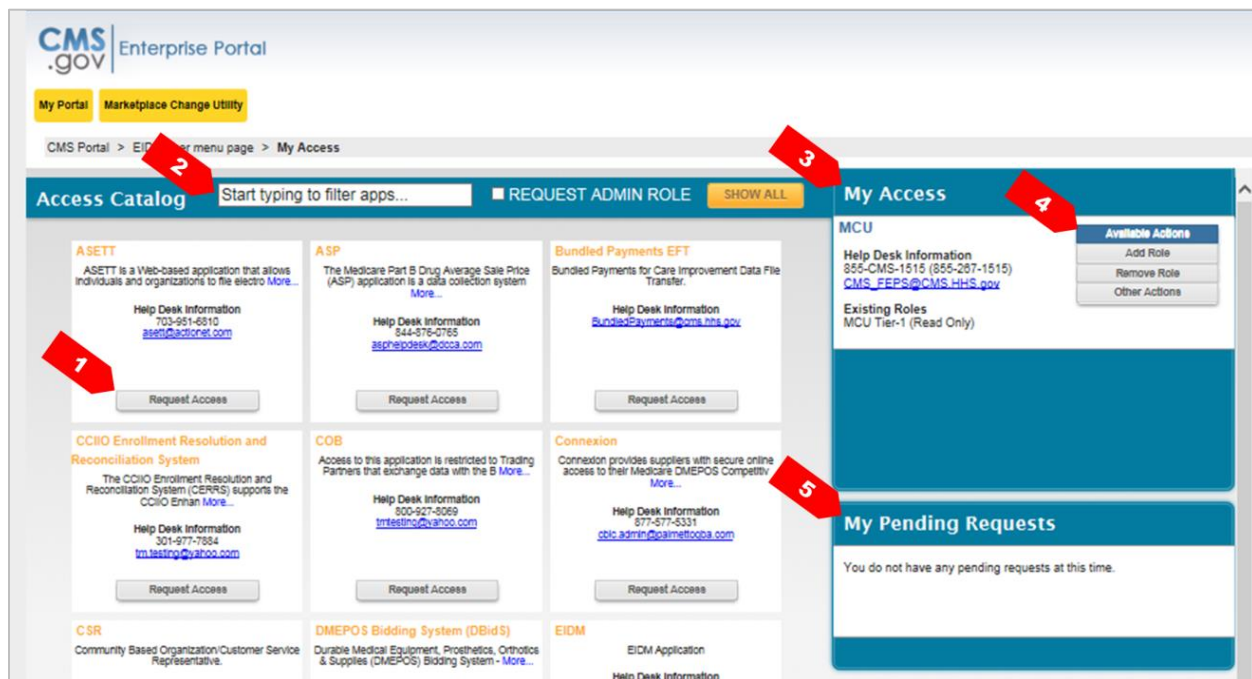
The catalog is accessed by selecting the **My Access** option from the CMS My Portal home page drop-down list or by selecting the **Request Access Now** button as shown in the image below. Requesting access is covered in more detail in the section titled **How to Request a Role**.



## Access Catalog Features

The features listed below refer to the numbered image that follows.

1. **Request Access** – Request access to a particular application by selecting the **Request Access** button on the application's tile.
2. **Search** – Search for a particular application by typing the name of the application in the search box on the **Access Catalog** title bar.
3. **My Access** – This panel displays information for each application for which the user has access including:
  - a. Contact information for the application's Help Desk.
  - b. The existing roles the user has been granted for the application.
4. **Available Actions** – This panel appears for each application for which the user has access. The user can select from the following options:
  - a. Add a Role – Directs the user to the **Request Additional Role** screen to request an additional role for the application.
  - b. Remove a Role – Directs the user to the **View and Manage My Access** screen to remove a role from the application.
  - c. Other Actions – Directs the user to the **View and Manage My Access** screen to select other options.
5. **My Pending Requests** – This section lists the pending requests for which the user has requested access.





## How to Request a Role

The following are the basic step-by-step instructions on how to request access to an application and a role, when you currently do not have a role in the application.

### Important Note

**To request a role for one of the applications listed below:**

- |                                          |                 |
|------------------------------------------|-----------------|
| • ASETT                                  | • MACPro        |
| • ASP                                    | • MCU           |
| • EPPE                                   | • MLMS          |
| • ESD                                    | • Open Payments |
| • FFM/Training– Agents/Brokers/Assisters | • SHIM          |
| • IC                                     | • T-MSIS        |
| • IDHD                                   | • zONE          |

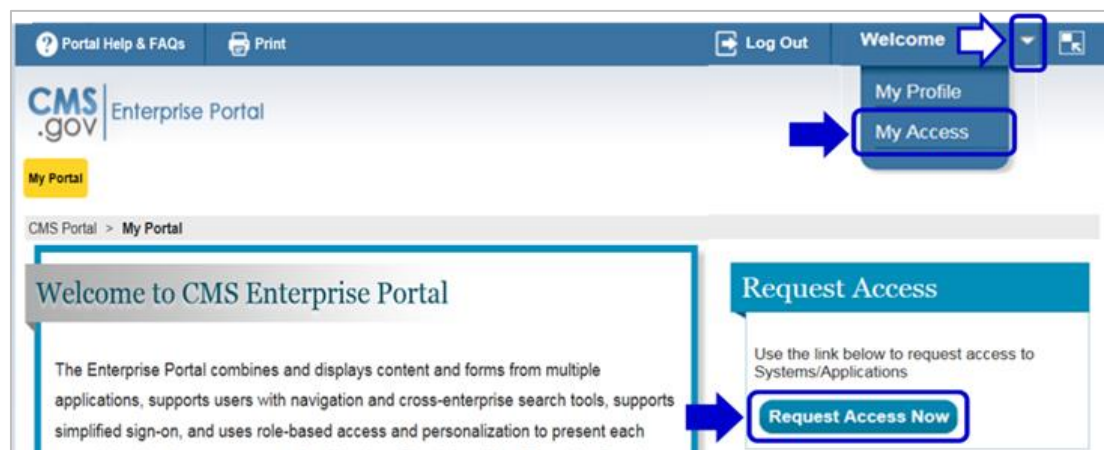
To request a role for all other applications, please **FOLLOW THESE STEPS**.

### Action

**Step 1** [Log into the CMS Enterprise Portal.](#)

Select the down arrow icon that appears next to your name at the top of page. Then select **My Access** from the drop-down list to continue.

Alternately, you may select **Request Access Now** to continue.



## Action

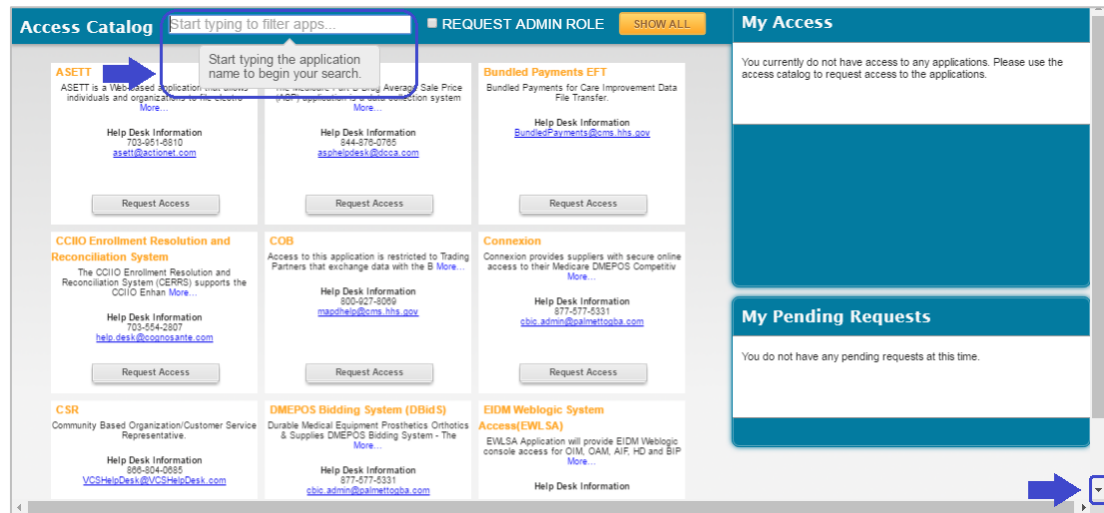
**Step 2** The application **Access Catalog** displays.

Scroll down to locate the application you need.

Alternatively, enter the first few letters of the application in the **Search** section and all of the applications beginning with those letters display below.

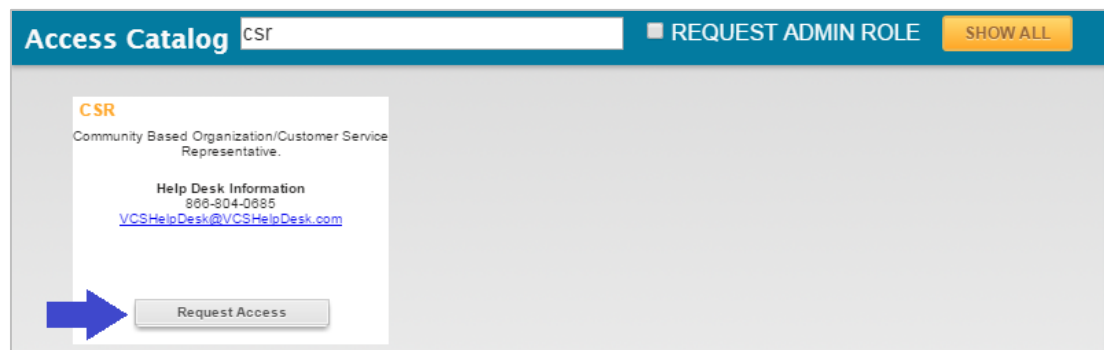
## Note

If you currently have access to one or more applications, they display in the **My Access** section. If you have pending requests, they display in the **My Pending Requests** section.



**Step 3** After entering the first few letters of the application in **Search**, the applications beginning with those letters are displayed.

Select **Request Access** for the application you need.



## Action

**Step4** The **Application Description** and **Select a role** sections are displayed.

Select the role you need from the **Select a role** drop-down list.

**Step 5** The **Request New Application Access** page displays.

If all of your required business contact information is not on file, you have to provide this information before you can continue.

Required fields are marked with an asterisk (\*) and an error message displays, if the information has not been entered or selected correctly, or is entered in the wrong format.

**Note**

If all of your business contact information is on file, the **“Please update your profile...”** message does not display and the **Select a role** drop-down list displays for you to continue.

If the **“Please update your profile...”** message displays, enter the required information and then select **Next**.

**Action****Step 6**

After providing your business contact information, EIDM may ask you to provide some additional information that is required for your application and the role you have selected.

Provide any additional information that is requested, enter a reason for the request in the **Reason for Request** box and then select **Submit**.

**Note**

[What You May Need Before You Begin](#)

In the example below, we selected the CSR application and the **User** role. EIDM also needs to know the Call Center. We selected 22nd Avenue, Phoenix, AZ from the list of Call Centers and then selected the single right arrow icon. This moved the 22nd Avenue, Phoenix, AZ Call Center to the Selected Call Center(s) box. We then entered the reason for the request in the **Reason for Request** box and select **Submit** to continue the process.

The screenshot shows the 'Request New Application Access' form. It includes a dropdown for 'Application Description' set to 'CSR' with the description 'Community Based Organization/Customer Service Representative.' Below this is a 'Select a role' dropdown set to 'User' with the description 'The user with this role is a customer service representative or staff member who organization.' The 'Call Center' section features a list of locations on the left and a 'Selected Call Center(s)' box on the right. The location '22nd Avenue, Phoenix, AZ' is highlighted in the list and moved to the selected box using the single right arrow icon. At the bottom, the 'Reason for Request' field contains the text 'Needed for the role.', and the 'Submit' button is highlighted. Blue arrows point to the 'Reason for Request' field and the 'Submit' button.

**Request New Application Access**

Application Description: CSR  
Community Based Organization/Customer Service Representative.

Select a role: User  
Role Description: The user with this role is a customer service representative or staff member who organization.

\* Call Center: 28th Avenue, Phoenix, AZ  
Black Canyon, Phoenix, AZ  
Coralville, IA  
Corbin, KY  
Lawrence, KS  
Palmetto, Lawrence, KS  
Palmetto, Richmond, VA  
Richmond, VA  
Senture, Monticello, KY  
Tampa, FL

22nd Avenue, Phoenix, AZ

\* Reason for Request: Needed for the role.

Submit Cancel

## Action

## Step 7

After selecting Submit, the **Request New Application Access Review** page displays.

Review the information displayed. Select **Edit** to modify the information.

Select **Submit** to submit the request for approval.

## Note

You may select **Cancel** to exit out of the Request New Application Access process. New information or changes entered do not save.

**Request New Application Access Review**

Application Description: CSR  
Community Based Organization/Customer Service Representative.

**Name**

Title:  First Name: Lee Middle Name:  Last Name: Wilson

Professional Credentials:  
Social Security Number: \*\*\*\*\*9652

**Business Contact Information**

Company Name: ABC  
Address 1: 123 Main Street  
Address 2:   
City: Any Town State/Territory: Arkansas Zip Code: 33333 Zip Code Extension:

**Phone**

Company Phone Number: 333-333-3333 Extension:   
Office Phone Number: 333-333-3333 Extension:

Role Selected: User  
Role Description: The user with this role is a customer service representative or staff member who

Call Center: 28th Avenue, Phoenix, AZ  
Black Canyon, Phoenix, AZ  
Coralville, IA  
Corbin, KY  
Lawrence, KS  
Palmetto, Lawrence, KS  
Palmetto, Richmond, VA  
Richmond, VA  
Senture, Monticello, KY  
Tampa, FL 22nd Avenue, Phoenix, AZ

Reason for Request: Needed for the role.

**Submit** **Cancel**

## Action

## Step 8

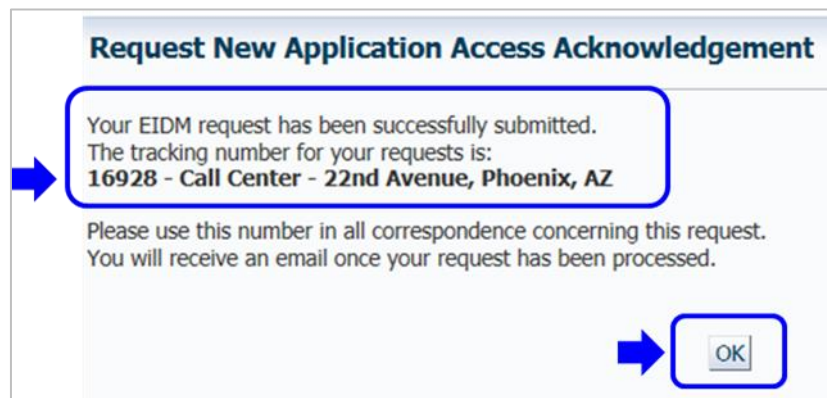
After selecting Submit, the **Request New Application Access Acknowledgement** page displays.

The acknowledgement page displays the tracking number for the request and informs you that you should receive an e-mail when the request has been processed.

**Note**

If you have submitted a request for a role in an application where a CMS 4-character Resource Access Control Facility (RACF) is used for identification and verification, you may have to change your password and create and enter an 8-character password the next time you log in, after your request has been approved. An 8-character password may be required for applications that use RACF IDs.

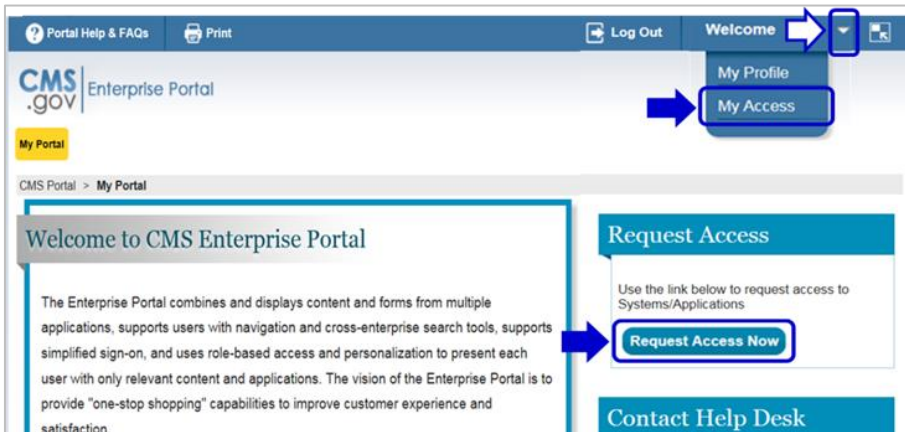
Select **OK** to close the acknowledgment page.



## To request a role for one of the applications listed below:

- ASETT
- ASP
- EPPE
- ESD
- FFM/Training–  
Agents/Brokers/Assisters
- IC
- IDHD
- MACPro
- MCU
- MLMS
- Open Payments
- SHIM
- T-MSIS
- zONE

Please **FOLLOW THESE STEPS**:

	Action
<b>Step 1</b>	<p><a href="#">Log into the CMS Enterprise Portal.</a></p> <p>Select the down arrow icon that appears next to your name at the top of page. Then select <b>My Access</b> from the drop-down list to continue.</p> <p>Alternately, you may select <b>Request Access Now</b> to continue.</p>  <p>The screenshot shows the CMS Enterprise Portal interface. At the top right, there is a 'Welcome' message with a dropdown arrow next to it. A blue arrow points to this arrow, and another blue arrow points to the 'My Access' option in the dropdown menu. Below the main content area, there is a 'Request Access' section with a 'Request Access Now' button. A blue arrow points to this button. The 'Contact Help Desk' link is also visible at the bottom right.</p>

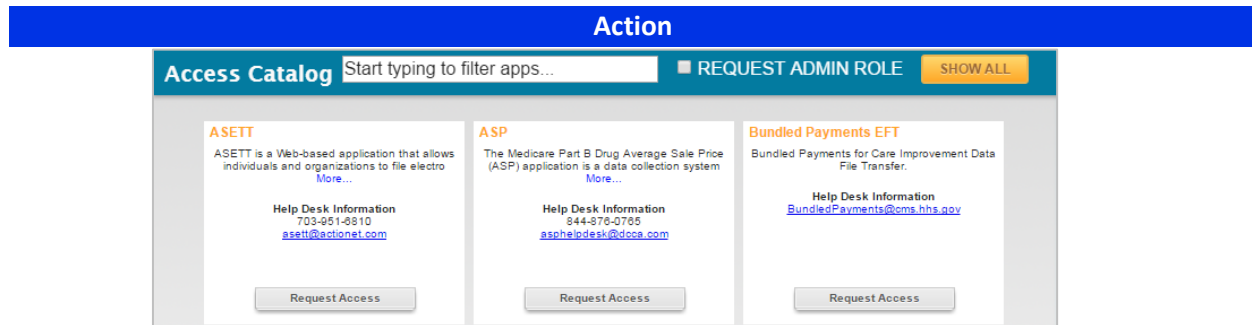
### Step 2 The application **Access Catalog** displays.

Scroll down to locate the application you need.

Alternatively, enter the first few letters of the application in the **Search** section and all of the applications beginning with those letters display.

#### Notes

- The applications are listed by their acronym not their full name. You must use the acronym of the application to search.
- If you currently have access to one or more applications, those applications are displayed in the **My Access** section. If you have pending requests, they are displayed in the **My Pending Requests** section.



**Step 3** Select the **Request Access** button on the application tile.



**Step 4** The **Request New System Access** page for that application displays.

Select a **Role** from the drop-down list. There may also be additional information that you need to provide to request a role, such as **State**, **Region**, **Authorization Code**, **User Type**, or other user information.

The screenshot shows the 'Request New System Access' page. On the left is a sidebar with the heading 'My Access' and two links: 'Request New System Access' and 'View and Manage My Access'. The main content area has the heading 'Request New System Access' and a sub-heading 'Select a System and then a role to request access.' Below this is a paragraph explaining the process. There are two dropdown menus: 'System Description' (set to 'MACPRO-Medicare and CHIP Program') and 'Role' (set to 'Select the Role'). A blue arrow points to the 'Role' dropdown. At the bottom right is a 'Cancel' button.



Action	
<b>My Access</b> <a href="#">Request New System Access</a> <a href="#">View and Manage My Access</a>	<h3>Request New System Access</h3> <p>Select a System and then a role to request access.</p> <p>Depending on your Level of Assurance (LOA) and the role that you request access to, to satisfy system security requirements you may need to complete <a href="#">Identity Verification</a>, establish credentials for <a href="#">Multi-Factor Authentication (MFA)</a>, or change your password the next time you login to the system. This may require you to provide additional information as part of the role request process. If applicable, please note that your request cannot be fulfilled until Identity Verification is complete and Multi-Factor Authentication (MFA) is established.</p> <p>       * System Description: <input type="text" value="MACPRO-Medicaid and CHIP Program"/> </p> <p>       * Role: <input type="text" value="MACPro State User"/> </p> <p>       * Region: <input type="text" value="CMS Region 9 San Francisco CA"/> </p> <p>       * States and Territories: <input type="text" value="California"/> </p> <p>Notes to the Approver: <input type="text"/></p> <p>Please enter any comments you want your Approver to see in the 'Notes to the Approver' field.</p> <p> <input type="button" value="Cancel"/> <input type="button" value="Submit"/> </p>

**Step 5** Select the **Submit** button to submit the request. To terminate the request, select the **Cancel** button and the system returns you to the **View and Manage My Access** page.

Depending on the application selected, you may have the option of entering a message in the **Notes to the Approver** field shown below.

<b>My Access</b> <a href="#">Request New System Access</a> <a href="#">View and Manage My Access</a>	<h3>Request New System Access</h3> <p>Select a System and then a role to request access.</p> <p>Depending on your Level of Assurance (LOA) and the role that you request access to, to satisfy system security requirements you may need to complete <a href="#">Identity Verification</a>, establish credentials for <a href="#">Multi-Factor Authentication (MFA)</a>, or change your password the next time you login to the system. This may require you to provide additional information as part of the role request process. If applicable, please note that your request cannot be fulfilled until Identity Verification is complete and Multi-Factor Authentication (MFA) is established.</p> <p>       * System Description: <input type="text" value="MACPRO-Medicaid and CHIP Program"/> </p> <p>       * Role: <input type="text" value="MACPro State User"/> </p> <p>       * Region: <input type="text" value="CMS Region 9 San Francisco CA"/> </p> <p>       * States and Territories: <input type="text" value="California"/> </p> <p>Notes to the Approver: <input type="text"/></p> <p>Please enter any comments you want your Approver to see in the 'Notes to the Approver' field.</p> <p> <input type="button" value="Cancel"/> <input type="button" value="Submit"/> </p>
------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

**Step 6** After submitting the request, a Request Acknowledgement message displays. Select the **OK** button to exit the screen and return to the **View and Manage My Access** page.

#### Note

If you have selected an application that does NOT have 'automatic' online approval, the request is evaluated by the application approver. You should receive an e-mail once the approver takes an action on the role request.

**Action****Request Acknowledgement**

Your request to access FFE Application using the FFE Application Approver role has been successfully submitted

Your request id is : 1367

Please use this number in all correspondence concerning this request.

You will be contacted via E-mail after your request has been processed



## Action

## Step 7

If you have selected an application that has 'automatic' online approval and you have entered valid information, you should receive a message similar to the one below for the application that you have chosen.

Select the **OK** button to exit the screen and return to the **View and Manage My Access** page.

## Note

To access the requested application, you need to logout and log back in.

CMS Portal > My Access

Screen reader mode Off | Accessibility Settings

**My Access**

[Request New System Access](#)

[View and Manage My Access](#)

**Request Acknowledgement**

Your request has successfully completed. You will need to logout and then log in to access the Health Insurance Oversight System Application. Select 'OK' to continue.

**OK**

You may return to the **Access Catalog** at any time by selecting the **My Access** option from the drop-down list.

Portal Help & FAQs | Print | Log Out | Welcome impl qeidmvaltwentythree

**CMS.gov Enterprise Portal**

My Portal | Marketplace Change Utility

CMS Portal > EIDM user menu page > My Access

Screen reader mode Off | Accessibility Settings

**My Access**

[Request New System Access](#)

[View and Manage My Access](#)

**Request New System Access**

Select a System and then a role to request access.

\* System Description:

\* Role:

\* Region:

\* States and Territories:

Notes to the Approver:

**Cancel** **Submit**

## How to Cancel a Pending Role Request

The following are the basic step-by-step instructions on how to cancel a pending role request.

### Important Note

To cancel a role for one of the applications listed below:

- ASETT
- ASP
- EPPE
- ESD
- FFM/Training– Agents/Brokers/Assisters
- IC
- IDHD
- MACPro
- MCU
- MLMS
- Open Payments
- SHIM
- T-MSIS
- zONE

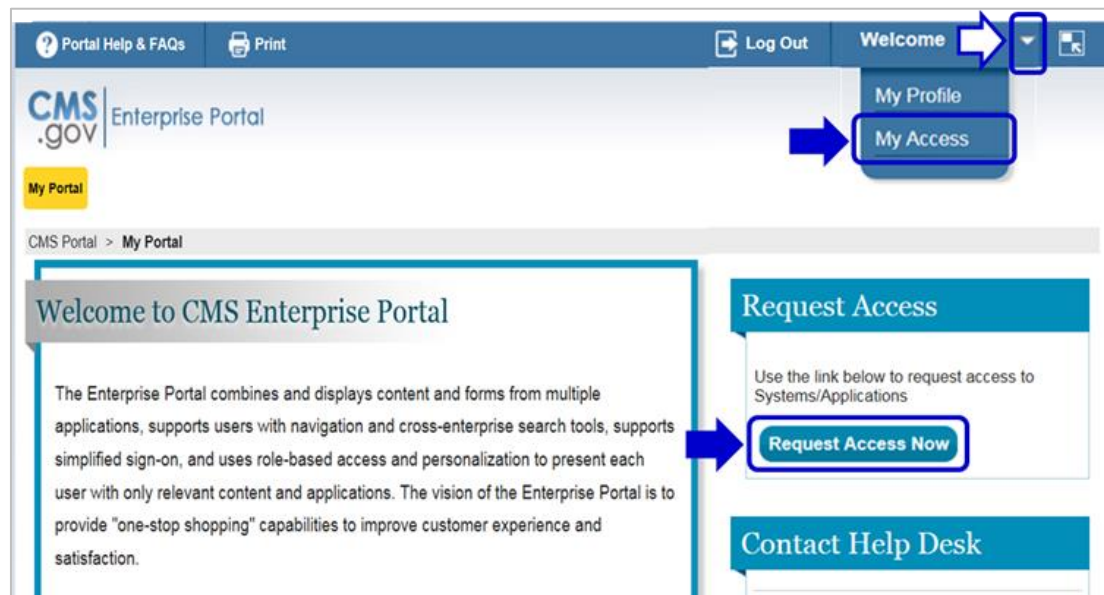
To cancel a pending role request for all other applications, please **FOLLOW THESE STEPS**.

### Action

#### Step 1 [Log into the CMS Enterprise Portal.](#)

Select the down arrow icon that appears next to your name at the top of page. Then select **My Access** from the drop-down list to continue.

Alternately, you may select **Request Access Now** to continue.



## Action

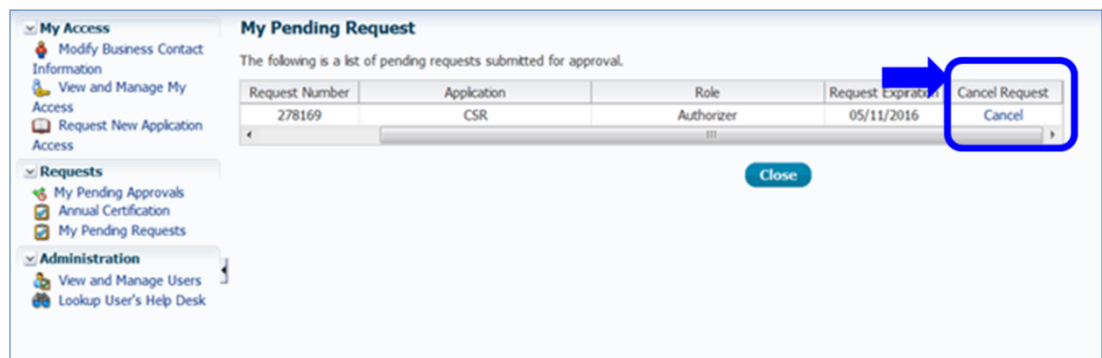
**Step 2** The application **Access Catalog** displays.

In the **My Pending Requests** section of the Access catalog, select the **Request ID** link for the pending request.

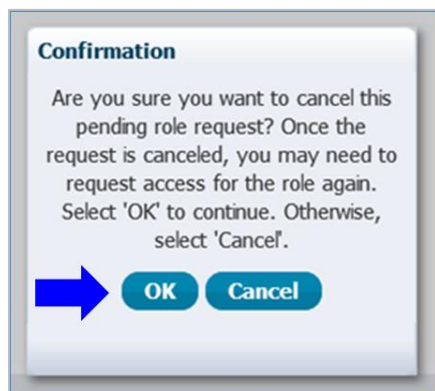


**Step 3** The **Pending Requests** panel displays on the **View and Manage My Access** page.

In the **Cancel Request** column, select the **Cancel** link for the role request you wish to cancel.



**Step 4** A pop-up confirmation displays. Select **OK** to submit the request.



## Action

- Step 5** The pending role request is removed from the **Pending Requests** queue and a confirmation message displays.



- Step 6** You should receive an e-mail notification that the role request has been cancelled.

Your request **277759** has been canceled.

You requested:  
 Application Name: IC Application  
 Role Name: IC\_BO

If you did not initiate this action, please contact your Application Help Desk.

Thank you,  
 CMS.gov

Please do not reply to this system generated E-mail.

**Note**

An e-mail notification of the role request cancellation is sent to both the user and the approver of the application.

### To cancel a role for one of the applications listed below:

- |         |                          |                 |          |
|---------|--------------------------|-----------------|----------|
| • ASETT | • FFM/Training–          | • MACPro        | • SHIM   |
| • ASP   | Agents/Brokers/Assisters | • MCU           | • T-MSIS |
| • EPPE  | • IC                     | • MLMS          | • zONE   |
| • ESD   | • IDHD                   | • Open Payments |          |

Please **FOLLOW THESE STEPS**:

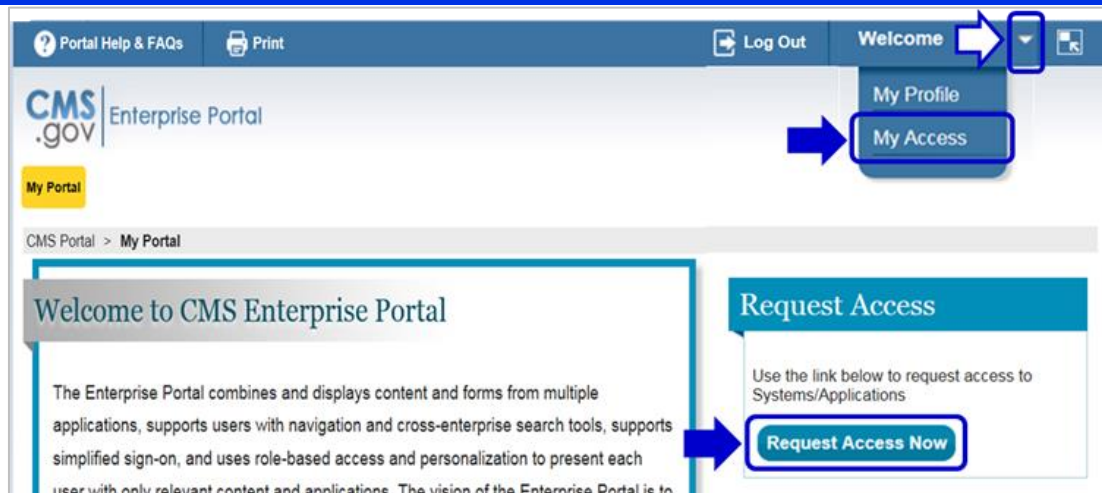
## Action

- Step 1** [Log into the CMS Enterprise Portal.](#)

Select the down arrow icon that appears next to your name at the top of page. Then select **My Access** from the drop-down list to continue.

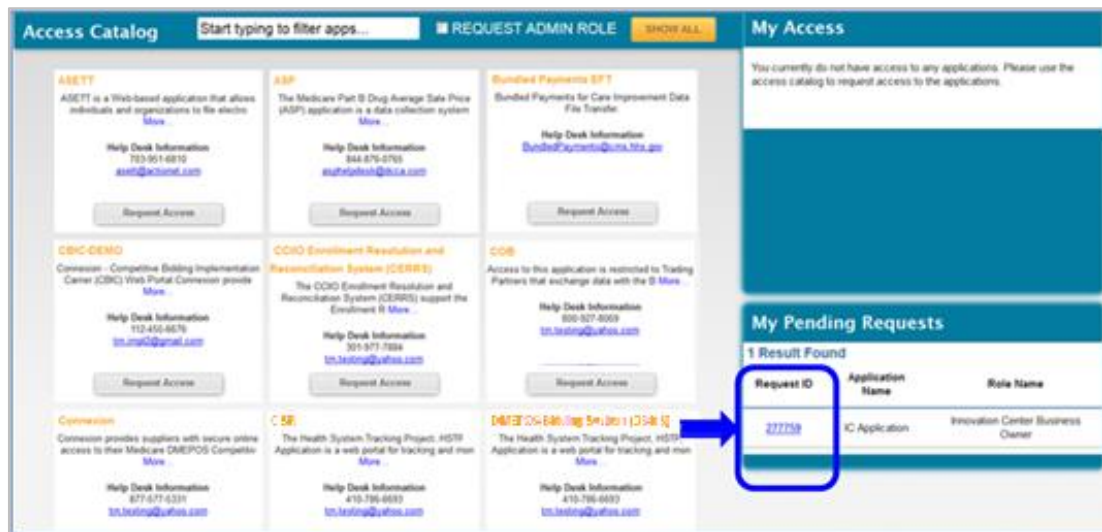
Alternately, you may select **Request Access Now** to continue.

## Action



**Step 2** The application **Access Catalog** displays.

In the **My Pending Requests** section of the Access catalog, select the **Request ID** link for the pending request.



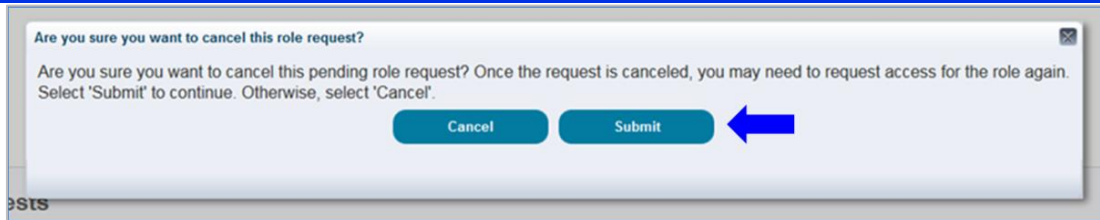
**Step 3** The **Pending Requests** panel displays on the **My Access** page.

In the **Cancel Request** column, select the **Cancel** link for the role request you wish to cancel.



**Step 4** A pop-up confirmation displays. Select **Submit** to submit the request.

### Action



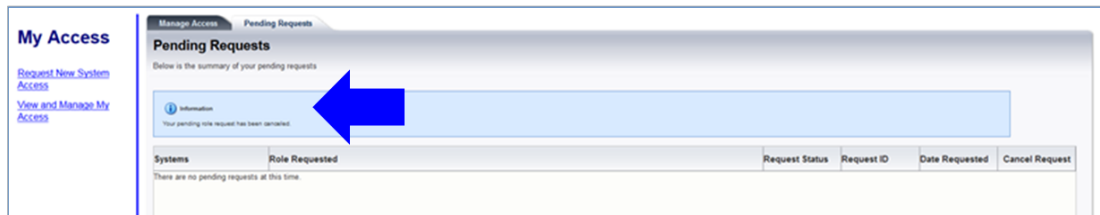
Are you sure you want to cancel this role request?

Are you sure you want to cancel this pending role request? Once the request is canceled, you may need to request access for the role again. Select 'Submit' to continue. Otherwise, select 'Cancel'.

Cancel Submit

A blue arrow points to the 'Submit' button.

**Step 5** The pending role request is removed from the **Pending Requests** queue and a confirmation message displays.



**My Access**

[Request New System Access](#)  
[View and Manage My Access](#)

**Pending Requests**

Below is the summary of your pending requests

**Information**  
Your pending role request has been canceled.

A blue arrow points to the 'Information' message.

Systems	Role Requested	Request Status	Request ID	Date Requested	Cancel Request
There are no pending requests at this time.					

**Step 6** You should receive an e-mail notification that the role request has been cancelled.

Your request **277759** has been canceled.

You requested:  
Application Name: IC Application  
Role Name: IC\_BO

If you did not initiate this action, please contact your Application Help Desk.

Thank you,  
CMS.gov

Please do not reply to this system generated E-mail.

### Note

An e-mail notification of the role request cancellation is sent to both the user and the approver of the application.



## Identity Verification

Depending on the role and the information you provide, the system may take you to the Identity Verification page. The Identity Verification process, also known as Remote Identity Proofing (RIDP), is necessary for roles that require a higher level of security to access. Identity Verification is done by asking you questions based on your personal information.

### Note

CMS uses credit reporting agencies like Experian to verify identity information. This is only an inquiry and does not affect your credit score.

To begin the Identity Verification process, **FOLLOW THESE STEPS:**

### Action

- Step 1** If you select a role that requires identity verification, the **Identity Verification** page displays. Select **Next** to begin the Identity Verification process.

### Identity Verification

To protect your privacy, you will need to complete Identity Verification successfully, before requesting access to the selected role. Below are a few items to keep in mind.

1. Ensure that you have entered your legal name, current home address, primary phone number, date of birth and E-mail address correctly. We will only collect personal information to verify your identity with Experian, an external Identity Verification provider.
2. Identity Verification involves Experian using information from your credit report to help confirm your identity. As a result, you may see an entry called a "soft inquiry" on your Experian credit report. Soft inquiries do not affect your credit score and you do not incur any charges related to them.
3. You may need to have access to your personal and credit report information, as the Experian application will pose questions to you, based on data in their files. For additional information, please see the Experian Consumer Assistance website -<http://www.experian.com/help/>

If you elect to proceed now, you will be prompted with a Terms and Conditions statement that explains how your Personal Identifiable Information (PII) is used to confirm your identity. To continue this process, select 'Next'.



Next

Cancel

## Action

## Step 2

Read the important **Terms and Conditions** information on this screen and indicate your agreement by selecting the **I agree to the terms and conditions** checkbox. Select the **Next** button to continue.

**Terms and Conditions**

OMB No. 0938-1236 | Expiration Date: 04/30/2017 | [Paperwork Reduction Act](#)

**Protecting Your Privacy**

Protecting your Privacy is a top priority at CMS. We are committed to ensuring the security and confidentiality of the user registering to EIDM. Please read the [CMS Privacy Act Statement](#), which describes how we use the information you provide.

Personal information is described as data that is unique to an individual, such as a name, address, telephone number, Social Security Number, and date of birth (DOB). CMS is very aware of the privacy concerns around PII data. In fact, we share your concerns. We will only collect personal information to verify your identity. Your information will be disclosed to Experian, an external authentication service provider, to help us verify your identity. If collected, we will validate your Social Security Number with Experian only for the purposes of verifying your identity. Experian verifies the information you give us against their records. We may also use your answers to the challenge questions and other PII to later identify you in case you forget or misplace your User ID /Password.

**HHS Rules Of Behavior**

We encourage you to read the [HHS Rules of Behavior](#), which provides the appropriate use of all HHS information technology resources for Department users, including Federal employees, contractors, and other system users.

I have read the HHS Rules of Behavior (HHS RoB), version 2010-0002.001S, dated August 26 2010 and understand and agree to comply with its provisions. I understand that violations of the HHS RoB or information security policies and standards may lead to disciplinary action, up to and including termination of employment; removal or debarment from work on Federal contracts or projects; and/or revocation of access to Federal information, information systems, and/or facilities; and may also include criminal penalties and/or imprisonment. I understand that exceptions to the HHS RoB must be authorized in advance in writing by the OPDIV Chief Information Officer or his/her designee. I also understand that violation of laws, such as the Privacy Act of 1974, copyright law, and 18 USC 2071, which the HHS RoB draw upon, can result in monetary fines and/or criminal charges that may result in imprisonment.

**Identity Verification**

I understand that the identity proofing services being requested are regulated by the Fair Credit Reporting Act and that my explicit consent is required to use these services. I understand that any special procedures established by CMS for identity proofing using Experian have been met and the services requested by CMS to Experian will be used solely to confirm the applicant's identity to avoid fraudulent transactions in the applicant's name.

I agree to the terms and conditions ☒

Next

Cancel

## Action

- Step 3** Enter your information into the required fields of the **Your Information** page.  
Select **Next** to continue the Identity Verification process.

### Your Information

Enter your legal first name and last name, as it may be required for Identity Verification.

\* First Name:  Middle Name:

\* Last Name:  Suffix:

---

Enter your E-mail address, as it will be used for account related communications.

\* E-mail Address:

Re-enter your E-mail address.

\* Confirm E-mail Address:

---

Enter your full 9 digit Social Security Number, as it may be required for Identity Verification.

\* Social Security Number:

---

Enter your date of birth in MM/DD/YYYY format, as it may be required for Identity Verification.

\* Date of Birth:

---

☒ U.S. Home Address ☐ Foreign address

Enter your current or most recent home address, as it may be required for Identity Verification.

\* Home Address Line 1:

Home Address Line 2:

\* City:  \* State:  \* Zip Code:  Zip Code Extension:  Country: USA

---

Enter your primary phone number, as it may be required for Identity Verification.

\* Primary Phone Number:



## Action

**Step 4** Depending on the information you provided, the **Verify Identity** page may be displayed. You are required to answer several questions about information that may be in your personal records. Please answer the questions to the best of your ability.

Select the **Next** button to submit the request. If you wish to terminate the request, select **Cancel** to return to the **View and Manage My Access** page.

**My Access**  
 View and Manage My Access  
 Request New Application Access

**Requests**  
 My Pending Requests

**Request New Application Access**  
 Screen reader mode Off | Accessibility Settings

Your Information | **Verify Your Identity**

**Verify Identity**

You may have opened a student loan in or around September 2013. Please select the lender that you have previously or you are currently making payments to. If you have not received student loans with any of these lenders now or in the past, please select 'NONE OF THE ABOVE/DOES NOT APPLY'.

- ☐ BANK ONE
- ☐ US DEPT OF EDUCATION
- ☐ GLHEC STUDENT LOAN
- ☐ FIRST SECURITY BK
- ☐ NONE OF THE ABOVE/DOES NOT APPLY

You may have opened a (HOME SAVING OF AMERICA) credit card. Please select the year in which your account was opened.

- ☐ 2009
- ☐ 2011
- ☐ 2013
- ☐ 2015
- ☐ NONE OF THE ABOVE/DOES NOT APPLY

Which one of the following retail credit cards do you have? If there is not a matched retail credit card, please select 'NONE OF THE ABOVE'.

- ☐ AMERICAN CREW
- ☐ KRAGEN
- ☐ SELF FRIDGES
- ☐ SARAY
- ☐ NONE OF THE ABOVE/DOES NOT APPLY

Which of the following is a current or previous employer? If there is not a matched employer name, please select 'NONE OF THE ABOVE'.

- ☐ SECOND CHANCE CONSIGNMENT
- ☐ USC SCH OF MED
- ☐ ROYAL TIRE AND AUTO
- ☐ FAITH CONSTRUCTION
- ☐ NONE OF THE ABOVE/DOES NOT APPLY

Please select the county for the address you provided.

- ☐ KOHALA
- ☐ HONOLULU
- ☐ MAUI
- ☐ KAUAI
- ☐ NONE OF THE ABOVE/DOES NOT APPLY

**Next** **Cancel**

**Step 5** After submitting the request, the Identity Verification confirmation displays. Select the **Next** button to continue with the role request process.

## Note

If the role auto-approves, the role is granted; log out and log back in to access it.

CMS Portal > EIDM user menu page > **My Access**

**My Access**  
 View and Manage My Access  
 Request New Application Access

**Requests**  
 My Pending Requests

**Request New Application Access**  
 Screen reader mode Off | Accessibility Settings

**Complete Step Up**

You have successfully completed the Remote Identity Proofing process.

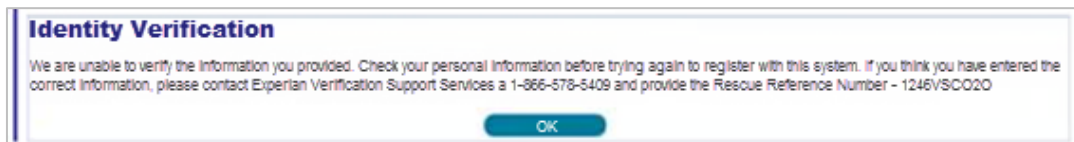
**Next**

## Identity Cannot be Verified

If you receive an error message that your identity cannot not be verified, it may simply mean that the information you provided could not be matched with the information available in the electronic records used for verification. You may need to take some additional steps to verify your identity.

Please follow the steps below.

Action	
<b>Step 1</b>	Check your personal information before trying again to register with the system.
<b>Step 2</b>	If you have entered the correct information and still cannot be verified, you are instructed to call the Experian Help Desk and provide the <b>Review Reference Number</b> displayed on the screen so the help desk representative can help you verify your identity. Experian is the contractor CMS uses to complete the Identity Verification process.



<b>Step 3</b>	After you have contacted Experian login to CMS Enterprise Portal and proceed again through Role Request process (see <a href="#">How to Request a Role</a> for the steps).
---------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------

<b>Step 4</b>	On the <b>Your Information</b> screen, select the check box if you have contacted Experian and completed the identity verification process over the phone with the Experian Support personnel.
---------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

### Note

Selecting this checkbox instructs the system to retrieve your identity verification results from Experian based on the phone verification process. You do have the option of not selecting the checkbox and continuing as you did in your original attempt of Identity Verification, prior to contacting Experian.

Enter your information in the required fields.

<b>Step 5</b>	If your identity cannot not be verified by Experian, please contact your Application Help Desk for the next steps (see <a href="#">Appendix B: Application Help Desk Information</a> for the contact information).
---------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

**Action****Note**

Depending on the type of role you requested, you may not be granted the role you requested until you have successfully undergone ID proofing.

## Multi-Factor Authentication (MFA) Registration

Multi-Factor Authentication (MFA) is a security mechanism that is implemented to provide an extra layer of security such as a security code, when logging in with your User ID and Password..

Registered CMS portal users who wish to access a CMS MFA protected application are directed through the MFA registration process.

During the MFA registration process, the CMS EIDM system requires registration of a phone or computer to add an additional level of security to a user's account. The user is given five options from which to select, to complete the registration process:

- **Smart Phone:** Users can download VIP access software on their smart phone/tablet. The user must enter the alphanumeric Credential ID that is generated by the VIP access client. The user then enters the Security Code generated by the VIP client.
- **Computer:** Users can download VIP access software on their computer. The user must enter the alphanumeric Credential ID generated by the VIP access client. The user enters the Security Code generated by the VIP client.
- **Short Message Service (SMS):** Users can use the SMS option to have their Security Code texted to their phone. The user must enter a valid phone number. The phone must be capable of receiving text messages. Carrier charges may apply.
- **Interactive Voice Response (IVR):** The user can select the IVR option to receive a voice message containing their Security Code. The user must provide a valid phone number and (optional) phone extension.
- **E-mail:** Users can select the e-mail option to receive an e-mail containing the Security Code required at login. The e-mail address on the user's profile is used.

### Notes

- Delays in e-mail transmission, spam filters, and other issues outside the user's control can make this the least desirable option to receive a security code.
- While the 'Security Code' for the VIP Access Software refreshes automatically every 30 seconds, the 'Security Code' for the 'E-mail' and 'One-Time Security Code' options expire in 30 minutes. The 'Security Code' for the other MFA device types expire in 10 minutes. If you are unable to enter the code within the allotted period, you must request a new one.

To gain access to a CMS MFA-protected application, **FOLLOW THESE STEPS:**

### Action

- Step 1** If you select a CMS MFA-protected application, the **Multi-Factor Authentication Information** page displays. Select **Next** to begin the MFA Registration process.

The screenshot shows a web interface for requesting new application access. On the left, there's a sidebar with 'My Access' (containing 'View and Manage My Access' and 'Request New Application Access') and 'Requests' (containing 'My Pending Requests'). The main area is titled 'Request New Application Access' and 'Multi-Factor Authentication Information'. Below the title, it says: 'To protect your privacy, you will need to add an additional level of security to your account. This will entail successfully registering your Phone, Computer or E-mail, before continuing the role request process. To continue this process, please select 'Next'.' At the bottom, there are two buttons: 'Next' (highlighted with a blue arrow) and 'Cancel'.

**Step 2****Action**

To make your account more secure, you are directed to the **Register Your Phone, Computer, or E-Mail** page. Select the **MFA Device Type** you wish to register from the drop-down list.

**Register Your Phone, Computer, or E-mail**

Adding a Security Code to your login, also known as Multi-Factor Authentication (MFA), can make your login more secure by providing an extra layer of protection to your user name and password.

You can associate the Security Code to your profile by registering your Phone, Computer or E-mail. Select the links below to find out more information about the options.

- ▷ [Phone/Tablet/PC/Laptop](#)
- ▷ [Text Message Short Message Service \(SMS\)](#)
- ▷ [Interactive Voice Response \(IVR\)](#)
- ▷ [E-mail](#)

Please note that you are only allowed two attempts to register your MFA device. If you are unable to register your device within two attempts please log out, then log back in to try again.

Select the MFA Device Type that you want to use to login to secure applications from the dropdown menu below.

\* MFA Device Type:

Select MFA Device Type ▼



Next

Cancel

**Notes**

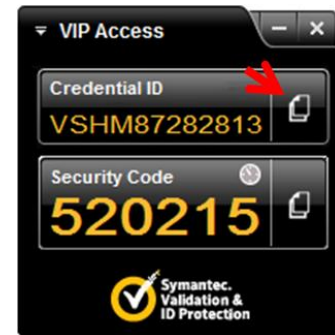
- **For VIP Client:** Enter the Credential ID generated by the VIP Access client.
- **For Text:** You have to enter a valid phone number to receive your Security Code.
- **For Interactive Voice Response (IVR):** Enter the phone number and (optional) extension to be used during login to obtain the Security Code. The extension may begin with any one of the following: asterisks '\*'; period '.'; comma ','; pound '#', followed by numeric 0 to 9. For example: 4885554444, 1112.
  - , **(comma)** Creates a short delay of approximately 2 seconds;
  - . **(period)** Creates a longer delay of approximately 5 seconds;
  - \* **(asterisks)** Used by some phone systems to access an extension;
  - # **(pound/hash)** Used by some phone systems to access an extension; and
- You may use a comma if you are not sure of the special character supported by your company's phone system.
- **For E-mail:** The e-mail on your profile is used to send the Security Code required at login.



## Action

**Using the VIP Client**

1. Depending on the option you select, download the VIP Access software from the URL provided on the **Register Your Phone or Computer** page.
2. Once downloaded, select the **VIP Access Icon** on your desktop to activate the **VIP Access** window.
3. Select the pages icon next to the **Credential ID** to copy the alphanumeric code.
4. Place your cursor in the **Credential ID** on the **Register Phone or Computer** page and right click to paste it in.



**Step 3** Enter the credentials of the device (VIP Client shown) and a short description in of the device in the **MFA Device Description** field. Then select **Next** to submit your registration.

**Register Your Phone, Computer, or E-mail**

Adding a Security Code to your login, also known as Multi-Factor Authentication (MFA), can make your login more secure by providing an extra layer of protection to your user name and password.

You can associate the Security Code to your profile by registering your Phone, Computer or E-mail. Select the links below to find out more information about the options.

- ▷ [Phone/Tablet/PC/Laptop](#)
- ▷ [Text Message Short Message Service \(SMS\)](#)
- ▷ [Interactive Voice Response \(IVR\)](#)
- ▷ [E-mail](#)

Please note that you are only allowed two attempts to register your MFA device. If you are unable to register your device within two attempts please log out, then log back in to try again.

Select the MFA Device Type that you want to use to login to secure applications from the dropdown menu below.

\* MFA Device Type:

Enter the alphanumeric code that displays under the label Credential ID on your device.

\* Credential ID:

\* MFA Device Description:



Next

Cancel

**Step 4** After submitting the registration, a message that you have successfully registered your device displays. Select **Next** to continue the role request process.

**Action**

ation  
sts

### Register Your Phone, Computer, or E-mail

You have successfully registered your Phone/Computer/E-mail to your user profile. Please select 'Next' to continue with your role request.

➔ [Next](#)

## Optional Multi-Factor Authentication (MFA)

Some roles have a reduced level of security requirements and offer MFA as an option to add to their profile.

A user who selects a role that offers MFA as an option is directed to the Multi-Factor Authentication Information Page. The user can select **Add MFA**, to begin the MFA process described in the **Multi-Factor Authentication (MFA) Registration** section, or **Skip MFA**, to skip MFA authentication altogether.

### Multi-Factor Authentication Information

Adding a security code to your login also known as Multi-Factor Authentication (MFA) can make your login more secure by providing an extra layer of protection to your user name and password. You may choose to add this additional level of security to prevent unauthorized access to your account.

To access a CMS application which requires a security code to be input at the time of login, select "Add MFA" and follow the on-screen instructions to add the additional level of security.

Select "Skip MFA" to skip adding the additional level of security and to continue with the role request. If you choose to skip MFA now, you can always add it later to your account by accessing the 'My Profile' link from the Welcome menu on the top right corner of the page.

Select 'Cancel' to end the role request.

Add MFA
Skip MFA
Cancel

While registering an MFA device, if a user wishes to continue without MFA, he can select **Proceed without MFA**. The user is directed to the next step of the role request process.

Select the MFA Device Type that you want to use to login to secure applications from the dropdown menu below.

\* MFA Device Type: Phone/Tablet/PC/Laptop ▼

Enter the alphanumeric code that displays under the label Credential ID on your device.

\* Credential ID :

\* MFA Device Description:

Next
Proceed without MFA
Cancel

## 6. Checking the Status of a Pending Request

The following are the basic step-by-step instructions on how to use the **My Pending Requests** feature to check the status of a pending request.

### Step 1 Action

**Step 1** [Log into the CMS Enterprise Portal.](#)

Select the down arrow icon that appears next to your name at the top of page. Then select **My Access** from the drop-down list to continue.

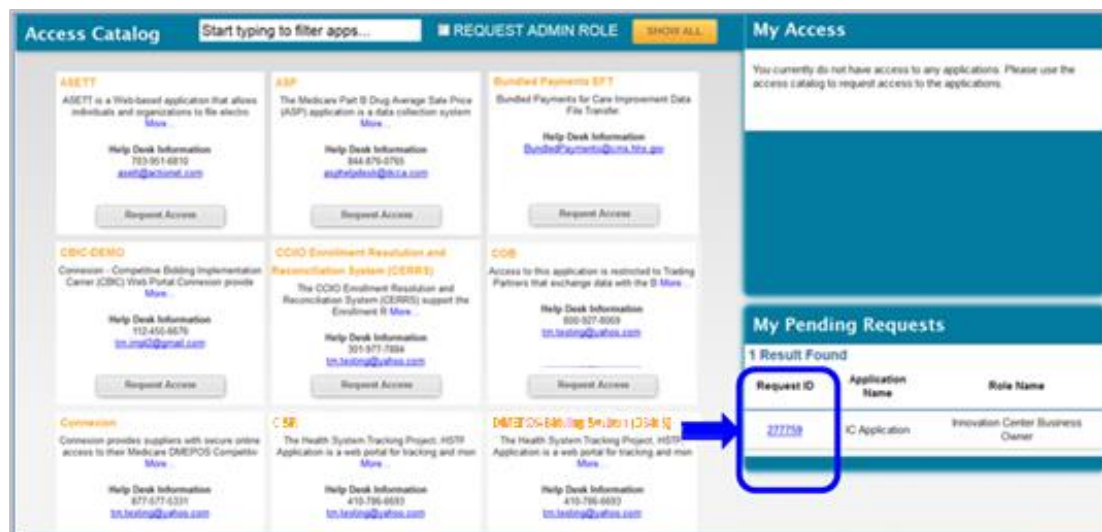
Alternately, you may select **Request Access Now** to continue.



**Step 2** The **Access Catalog**, **My Access** and **My Pending Requests** sections are displayed.

Scroll down to **My Pending Requests**. All of your pending requests are displayed in the **My Pending Requests** section.

Select the Request ID number of a pending request to view the details.



**Action**

**Step 3** After selecting the Request ID number, additional information displays about the pending request.

**Note**

You should not be able to open or view a pending request. You should receive an e-mail when a pending request has been approved, rejected or has expired.

Select **Close** to close the My Pending Request information.

**My Pending Request**

The following is a list of pending requests submitted for approval.

Submission Date	Request Number	Application	Role	Request Expiration
08/15/2014	150010 - 22nd A...	CSR	User	10/14/2014

[Close](#)

## 7. Viewing and Changing Your Access

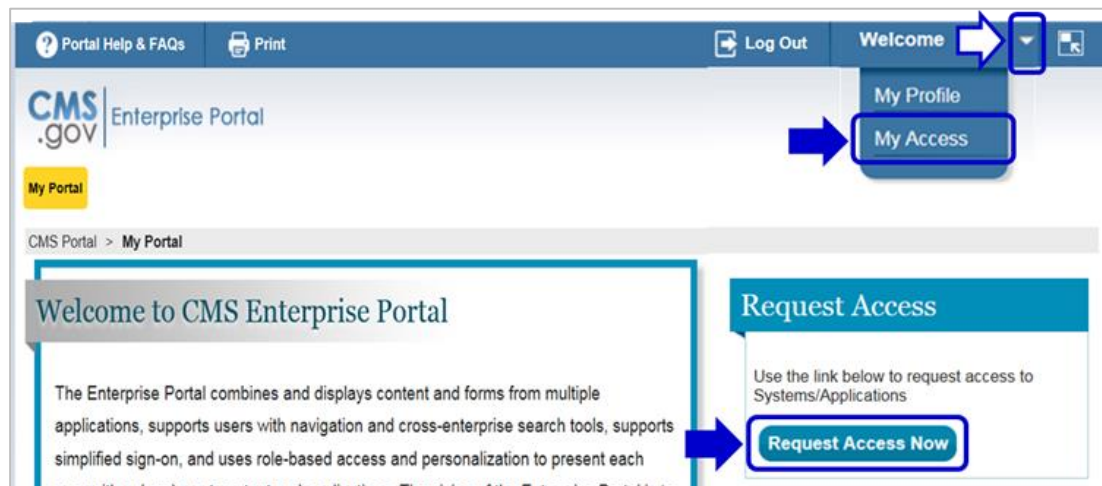
### How to View/Modify Your Business Contact Information

The following are the basic step-by-step instructions on how to use the **Modify Business Contact Information** feature to modify your business contact information.

Step 1	Action
	<a href="#">Log into the CMS Enterprise Portal.</a>

Select the down arrow icon that appears next to your name at the top of page. Then select **My Access** from the drop-down list to continue.

Alternately, you may select **Request Access Now** to continue.

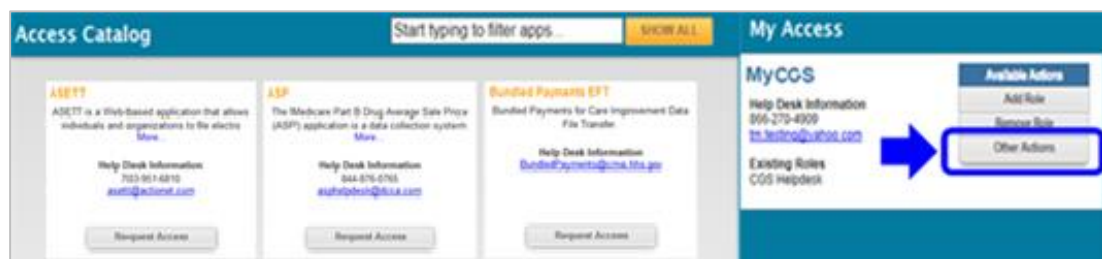


Step 2	The <b>Access Catalog</b> , <b>My Access</b> and <b>My Pending Requests</b> sections are displayed.
--------	-----------------------------------------------------------------------------------------------------

Select **Other Actions** in the **My Access** section to continue. If there are multiple **Other Actions** options displayed, you may select any "Other Actions" option to continue.

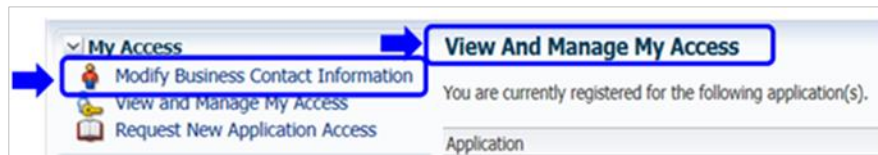
#### Note

If you currently do not have access to at least one application, the **Available Actions** in the **My Access** section are not displayed. You are not able to modify your business contact information until you have been approved for access to at least one application.



## Action

- Step 3** After selecting **Other Actions**, the **View and Manage My Access** page displays.  
Select **Modify Business Contact Information**.



- Step 4** The **Modify Business Contact Information** page displays. The fields in gray on the **Modify Business Contact Information** page cannot be changed or deleted.

Modify or enter the appropriate information on the **Modify Business Contact Information** page to update your business contact information.

Select **Next** to complete the **Modify Business Contact Information** process.

**Note**

You may select **Cancel** at any time to exit out of the **Modify Business Contact Information** process. New information or changes do not save.

In the example below, we add the Office Phone Number.

**Modify Business Contact Information** \* Required Field

Please update your profile to continue the request for an application access.

**Name**

Title:  First Name:  Middle Name:  Last Name:  Suffix:

Professional Credentials:

Social Security Number:

**Business Contact Information**

\* Company Name:

\* Address 1:

Address 2:

\* City:  \* State/Territory:  \* Zip Code:  Zip Code Extension:

**Phone**

\* Company Phone Number:  Extension:

\* Office Phone Number:  Extension:

**Next** **Cancel**



## Action

**Step 5** The **Modify Business Contact Information - Review** page displays.

Review the information displayed. Select **Edit** to modify the information.

Select **Submit** to submit the request for approval.

**Note**

You may select **Cancel** to exit out of the Modify Business Contact Information process. New information or changes entered do not save.

**Modify Business Contact Information - Review**

**Name**

Title: [v] First Name: [Clair] Middle Name: [ ] Last Name: [Roberts] Suffix: [v]

Professional Credentials: [ ]

Social Security Number: [231-33-1900]

**Business Contact Information**

Company Name: [Lg Company]

Address 1: [234 Main St.]

Address 2: [ ]

City: [Westminster] State/Territory: [Maryland v] Zip Code: [21157] Zip Code Extension: [ ]

**Phone**

Company Phone Number: [290-222-2222] Extension: [ ]

Office Phone Number: [290-222-2222] Extension: [ ]

[Edit] [Cancel] [Submit]

**Step 6** After selecting Submit, the **Modify Business Contact Information – Acknowledgement** page displays. The acknowledgement page displays the tracking number, for future correspondence, and informs you that you should receive an e-mail when the request has been processed.

Select **OK** to close the acknowledgement page.

**Modify Business Contact Information- Acknowledgement**

Your EIDM request has been successfully submitted.  
The tracking number for your requests is:  
**13397**  
Please use this number in all correspondence concerning this request.  
You will receive an email once your request has been processed.

[OK]




## How to View/Modify Your Existing Role Information

The following are the basic step-by-step instructions on how to use the **View/Modify a Role** feature to view/modify your existing role information and add/remove a role attribute, if your application allows you to add/remove an attribute.

- When you registered for a role, you may have also registered for additional features, reports, or other details needed for your role. These are called role “attributes”.
- To view your role information, follow steps 1-5.
- To add an attribute to your role, continue with steps 6-8.
- To remove an attribute from your role, continue with steps 9-13.

## Viewing Your Role Information

To view your role information, follow Steps 1-5.

	Action
<b>Step 1</b>	<p><a href="#">Log into the CMS Enterprise Portal.</a></p> <p>Select the down arrow icon that appears next to your name at the top of page. Then select <b>My Access</b> from the drop-down list to continue.</p> <p>Alternately, you may select <b>Request Access Now</b> to continue.</p> 

**Step 2** The **Access Catalog**, **My Access**, and **My Pending Requests** sections are displayed. Any existing roles you have are displayed in the **My Access** section.

Select **Other Actions** in the **My Access** section to continue. If there are multiple **Other Actions** options displayed, you may select any “Other Actions” option to continue.



## Action

**Step 3** The **View and Manage My Access** page displays.

Select **View/Modify a Role** to continue. If there are multiple applications displayed, select **View/Modify a Role** for the application you want to view.

**View And Manage My Access**

You are currently registered for the following application(s).

Application	Take an Action
MA/MA-PD/PDP/CC	<a href="#">Add a Role</a> <a href="#">Remove a Role</a> <a href="#">View/Modify a Role</a>

**Step 4** The **View/Modify Role Information** page displays.

All of your roles are displayed in the **My Roles** section. All of your existing role information displays in the **Existing Role Details** section. Select **Modify Attributes** to continue. If there are multiple roles displayed, select **Modify Attributes** for the role you want to add a role attribute to.

**View/Modify MA/MA-PD/PDP/CC Role Information**

Select the link in the Take an Action column to modify the role information in your profile.

My Roles	Existing Role Details	Take an Action
MA Submitter	<b>RACF ID:</b> <b>Report Access Type:</b> Access to Financial Report <b>Plan Contract Number:</b> H1234	<a href="#">Modify Attributes</a>
MCO Representative UI Update	<b>RACF ID:</b> <b>Plan Contract Number:</b> H1234	<a href="#">Modify Attributes</a>

**Step 5** After selecting **Modify Attributes**, the **View/Modify Role Attributes** page displays.

All of your existing role details are also displayed.

**View/Modify MA/MA-PD/PDP/CC Role Attributes**

Selected Application: MA/MA-PD/PDP/CC

Role: MA Submitter

Select at least one Report Access Type

\* Report Access Type: ☒ Access to Financial Report ☐ Access to Non-Financial Report

Plan Contract:

Roles without attributes can select **Cancel** to close the page.

## Adding an “Attribute” to Your Role

To add an attribute to your role, continue with Steps 6-8.

Action	
<b>Step 6</b>	Provide the additional attributes needed for your role and enter the reason for the request in the <b>Reason for Request</b> box.

Select **Next** to complete the **Add a Role Attribute** process.

### Note

You may select **Cancel** at any time to exit out of the Add a Role Attribute process. New information or changes entered do not save.

In the example below, we add the **Access to Non-Financial Report** and **Plan Contract Number** H1111, enter the reason for the request in the **Reason for Request** box, and select **Next** to continue.

**View/Modify MA/MA-PD/PDP/CC Role Attributes**

Selected Application: MA/MA-PD/PDP/CC

Role: MA Submitter

Select at least one Report Access Type

\* Report Access Type: ☒ Access to Financial Report ☒ Access to Non-Financial Report

Plan Contract Number:

PDE Mailbox Number:

RAPS Mailbox Number:

RACF ID:

Reason for Request:

**Step 7** After selecting **Next**, the **View/Modify Role Attributes - Review** page displays.

Review the information displayed. Select **Edit** to modify the information.

Select **Submit** to submit the request for approval.

### Note

You may select **Cancel** to exit out of the Add a Role Attribute process. New information or changes entered do not save.

## Action

**View/Modify MA/MA-PD/PDP/CC Role Attributes- Review**

Selected Application: MA/MA-PD/PDP/CC

Role: MA Submitter

Select at least one Report Access Type

Report Access Type: ☒ Access to Financial Report ☒ Access to Non-Financial Report


Plan Contract Number:

PDE Mailbox Number:

RAPS Mailbox Number:

RACF ID:

Reason for Request:



**Step 8** After selecting Submit, the **View/Modify Role Attributes - Acknowledgement** page displays.


The acknowledgement page displays the tracking number for the request, the role, and the role attributes to be added.

Select **OK** to close the acknowledgment page.

**View/Modify MA/MA-PD/PDP/CC Role Attributes- Acknowledgement**

Your EIDM requests have been successfully submitted.  
The tracking numbers for your requests are:  
**12844 - ADD - MA Submitter - Plan Contract Number - H1111**

Please use these numbers in all correspondences concerning these requests.  
You will receive an email after each of your requests has been processed by an Approver.  
Modifications that do not require an approval are automatically updated to you profile.



## Removing an “Attribute” from Your Role

To remove an attribute from your role, continue with Steps 9-13.

Action	
<b>Step 9</b>	The <b>View/Modify Role Information</b> page displays.  All of your roles are displayed in the <b>My Roles</b> section. All of your existing role details are displayed in the <b>Existing Role Details</b> section.  Select <b>Modify Attributes</b> to continue. If there are multiple roles displayed, select <b>Modify Attributes</b> for the role you want to modify and remove a role attribute.

**Note**  
You may select **Cancel** at any time to exit out of the Remove a Role Attribute process. New information or changes entered do not save.

View/Modify MA/MA-PD/PDP/CC Role Information

Select the link in the Take an Action column to modify the role information in your profile.


My Roles	Existing Role Details	Take an Action
 MA Submitter	RACF ID:  Report Access Type: Access to Financial Report Plan Contract Number: H1234,H1111	 Modify Attributes

<b>Step 10</b>	After selecting <b>Modify Attributes</b> , the <b>View/Modify Role Attributes</b> page displays.  All of your existing role details are also displayed.
----------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------

**Note**  
Because this screen shows the existing role details, it is imperative that users not remove any of the existing details if access is still needed. Any information deleted from this screen results in a loss of access to the deleted attribute. For this reason, users who wish to add new access should add the additional information while keeping the original details intact.

View/Modify MA/MA-PD/PDP/CC Role Attributes

Selected Application: MA/MA-PD/PDP/CC  
Role: MA Submitter

Select at least one Report Access Type  
\* Report Access Type: ☒ Access to Financial Report ☐ Access to Non-Financial Report  
Plan Contract Number:  H1234, H1111  
PDE Mailbox Number:

## Action

**Step 11** Remove the attribute or attributes you are required to remove, enter the reason for the request in the **Reason for Request** box, and then select **Next** to continue.

In the example below, we removed **Plan Contract Number** H1111, entered the reason for the request in the **Reason for Request** box, and selected **Next** to continue.

**View/Modify MA/MA-PD/PDP/CC Role Attributes**

Selected Application: MA/MA-PD/PDP/CC

Role: MA Submitter

Select at least one Report Access Type

\* Report Access Type: ☒ Access to Financial Report ☐ Access to Non-Financial Report

Plan Contract Number: H1234

PDE Mailbox Number:

RAPS Mailbox Number:

RACF ID:

Reason for Request: \* Not needed for the role.

**Next** **Cancel**

"H1111" has been removed.

**Step 12** After selecting **Next**, the **View/Modify Role Attributes - Review** page displays. Review the information displayed. Select **Edit** to modify the information. Select **Submit** to submit the request for approval.

## Note

You may select **Cancel** to exit out of the Remove a Role Attribute process. New information or changes entered do not save.

In the example below, the information is correct. Select **Submit**.

**View/Modify MA/MA-PD/PDP/CC Role Attributes - Review**

Selected Application: MA/MA-PD/PDP/CC

Role: MA Submitter

Select at least one Report Access Type

Report Access Type: ☒ Access to Financial Report ☐ Access to Non-Financial Report

Plan Contract Number: H1234

PDE Mailbox Number:

RAPS Mailbox Number:

RACF ID:

Reason for Request: Not needed for the role.

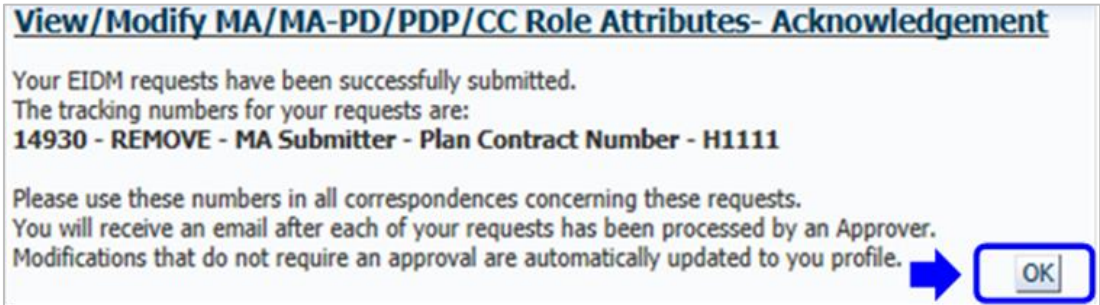
**Submit** **Cancel**



Action	
<b>Step 13</b>	After selecting Submit, the <b>View/Modify Role Attributes - Acknowledgement</b> page displays.

The acknowledgement page displays the tracking number for the request, the role, and the role attributes to be removed.

Select **OK** to close the acknowledgement page.



## How to Replace an Existing Role with Another Role

The following is a quick overview on how to replace an existing role in an application with another role.

When you have an existing role (*e.g., an end user role, back-up security official, back-up authorized official, back-up approver*) and you need to replace your role with another role, for example, a higher-level role, you have to:

1. **Remove your existing role first**, and replace it with another role.
2. Submit a request for access for the new role.

To remove an existing role, follow the step-by-step instructions below.

To request access for a new role, or another role, follow the [How to Request a Role](#)

## How to Remove a Role

The following are the basic step-by-step instructions on how to use the **Remove Role** feature to remove a role, when you are required to remove a role, and your application allows you to remove a role.

### Important Note

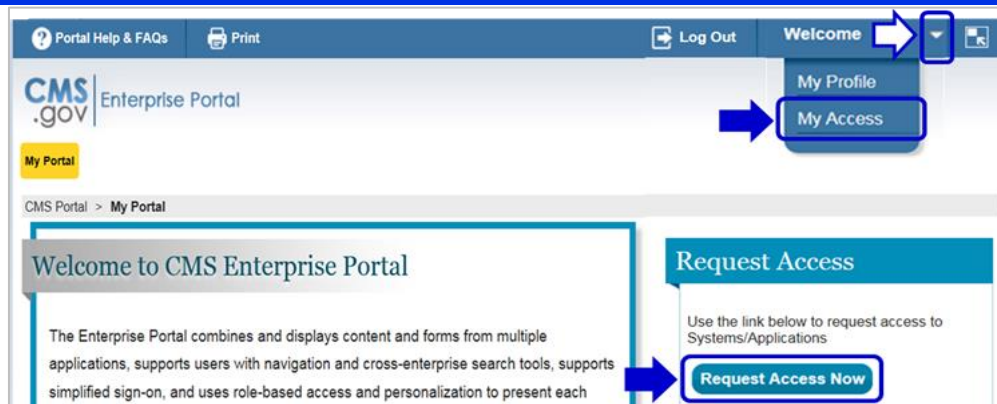
If you are a DMEPOS Authorized Official and you have no people in your organization, you may use the Remove a Role feature to remove your role from the organization. Since you have no persons in your organization, your organization is also removed when EIDM completes the remove a role process. However, if you have persons that have been approved to access your DMEPOS organization, or you have pending requests for access for your organization, you are not able to remove your Authorized Official role. The reason: The persons in your organization, or applying for access, must have an Authorized Official in the organization.

To remove a DMEPOS Authorized Official role or any other role, please **FOLLOW THESE STEPS**:

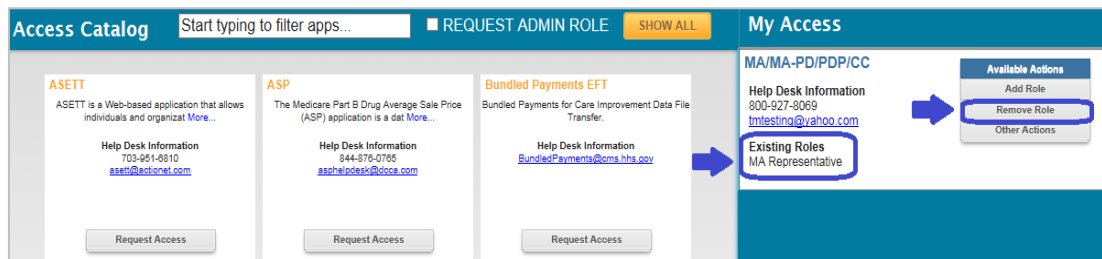
Action	
<b>Step 1</b>	<p>Log into the CMS Enterprise Portal.</p> <p>Select the down arrow icon that appears next to your name at the top of page. Then select <b>My Access</b> from the drop-down list to continue.</p> <p>Alternately, you may select <b>Request Access Now</b> to continue.</p>



## Action



- Step 2** The **Access Catalog**, **My Access**, and **My Pending Requests** sections are displayed. Any existing roles you have are displayed in the **My Access** section. Select **Remove Role** for the application for which you are required to remove a role.



- Step 3** The **Request to Remove Role** page displays. All of your roles in the application are displayed in the **My Roles** section. All of your existing role details are displayed in the **Existing Role Details** section. Select **Remove** for the role (backup security official, authorized official, service rep, end user, etc.) you wish to remove.

**Request to Remove MA/MA-PD/PDP/CC Role**

To remove a role from an application, click the Remove a Role link. You can only remove one role at a time. Once a role is removed from an application, you will need to request access again to have it restored.

**My Role Information:**

My Roles	Existing Role Details	Remove a Role
MA Representative	<b>RACF ID:</b> XYZ0 <b>Plan Contract Number:</b> H1111	

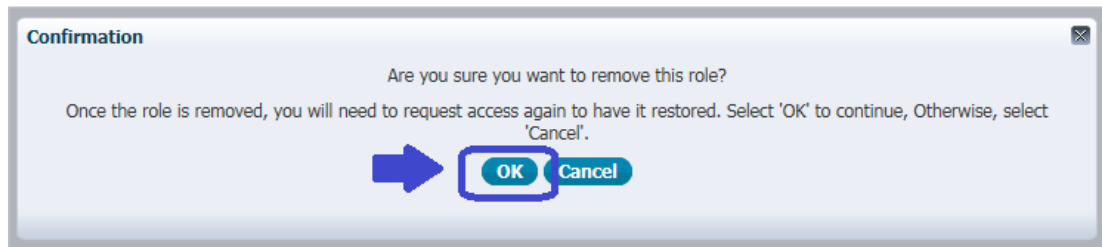
**Cancel**

## Action

- Step 4** A confirmation message displays. The confirmation message asks “Are you sure you want to remove this role?” Review the confirmation message. Select **OK** to continue to remove the role. Select **Cancel** to stop the removal of the role.

**Warning**

When you select **OK**, the role is removed at that time. You are not able to “undo” the removal.



- Step 5** The **Request to Remove Role Acknowledgement** page displays.

The acknowledgement page displays the tracking number, for future correspondence, the role, and the role attribute or attributes that were removed.

Select **OK** to close the acknowledgement page.

**Request to Remove MA/MA-PD/PDP/CC Role Acknowledgement**

Your EIDM request has been successfully processed.  
 The tracking number for your request is:  
**2174835 - MA Representative**  
 has been removed.  
 Please use this number in all correspondence concerning this request.  
 Please allow a few minutes for processing before viewing the completed request.

**Note**

To request access to a new role, or another role, follow the Step-by-Step instructions on how to request access to an application and a role. Please allow a few minutes for processing the submitted request before requesting access to another role.

## How to Add a Role

When you currently have a role in an application, and you are required to add another role in the same application, follow the step-by-step instructions below.

### Important Note

If you currently do not have a role in the application, you have removed your role in the application, or your role has been removed, you need to request a role. Please see [How to Request a Role](#).

The following are the basic step-by-step instructions on how to use the **Add a Role** feature when you already have a role in your application and your application allows you to add an additional role.

### Action

#### Step 1

After navigating to the **View and Manage My Access** page, select **Add a Role** for the application you are required to add a role.

**View and Manage My Access**

You are currently registered for the following application(s).

Application	Take an Action
MA/MA-PD/PDP/CC	<a href="#">Add a Role</a> <a href="#">Remove a Role</a> <a href="#">View/Modify a Role</a>

#### Step 2

The **Request Additional Role** page displays.

All of your roles in the application are displayed in the **My Roles** section. All of your existing role details are displayed in the **Existing Role Details** section.

Select a role (security official, backup security official, authorized official, service rep, end user, etc.) from the **Select a role** drop-down list.

**Request Additional MA/MA-PD/PDP/CC Role**

Application Description: MA/MA-PD/PDP/CC  
Medicare Advantage/Medicare Advantage - Prescription Drug/Prescription Drug Plan/Cost Contracts/ Medicaid

My Roles	Existing Role Details
MA Submitter	<b>RACF ID:</b> <b>Report Access Type:</b> Access to Financial Report <b>Plan Contract Number:</b> H1234

Select a role: MCO Representative UI Update

Action

Step 3

The **Request Additional Role** page displays.

Provide the additional details needed for the role you are requesting, enter the reason for the request in the **Reason for Request** box.

Select **Next** to continue.

Note

You may select **Cancel** at any time to exit out of the Add a Role process. New information or changes entered do not save.

In the example below, we added **Plan Contract Number** H1234, entered the reason for the request in the **Reason for Request** box, and selected **Next** to continue.

Request Additional MA/MA-PD/PDP/CC Role

Application Description: MA/MA-PD/PDP/CC

Medicare Advantage/Medicare Advantage - Prescription Drug/Prescription Drug Plan/Cost Contracts/ Medicaid S

My Roles	Existing Role Details
MA Submitter	<div>RACF ID:</div> <div>Report Access Type: Access to Financial Report</div> <div>Plan Contract Number: H1234</div>

Select a role: MCO Representative UI Update

Role Description: The user with this role will be able to enter and correct plan-responsible beneficiary er  
user interface MARx UI.

Plan Contract Number: H1234

PDE Mailbox Number:

RAPS Mailbox Number:

RACF ID:

\* Reason for Request: Needed for the role.

Next

Cancel

## Action

**Step 4** After selecting **Next**, the **Request Additional Role Review** page displays.

Review the information displayed. Select **Edit** to modify the information. Select **Submit** to submit the request for approval.

**Note**

You may select **Cancel** to exit out of the Add a Role process. New information or changes entered do not save.

**Request Additional MA/MA-PD/PDP/CC Role Review**

Application Description: MA/MA-PD/PDP/CC  
Medicare Advantage/Medicare Advantage - Prescription Drug/Prescription Drug Plan/Cost Contracts/ Medicaid State Agency

My Roles	Existing Role Details
MA Submitter	<b>RACF ID:</b>  <b>Report Access Type:</b> Access to Financial Report <b>Plan Contract Number:</b> H1234

Role Selected: MCO Representative UI Update  
Role Description: The user with this role will be able to enter and correct plan-responsible beneficiary enrollment related data in the interface MARx UI.

Plan Contract Number: H1234  
PDE Mailbox Number:   
RAPS Mailbox Number:   
RACF ID:   
Reason for Request: Need to perform role.

Edit Submit Cancel

**Step 5** After selecting **Submit**, the **Request Additional Role Review Acknowledgement** page displays. It displays the tracking number for the request and the role attributes requested. Select **OK** to close the acknowledgement page.

**Request Additional MA/MA-PD/PDP/CC Role Review Acknowledgement**

→ Your EIDM request has been successfully submitted.  
The tracking number for your requests is:  
**12649 - Plan Contract Number - H1234**

Please use this number in all correspondence concerning this request.  
You will receive an email once your request has been processed.

→ OK

## How to Unlock Your Account

For security purposes, the system may lock your account because of any of the following circumstances:

- The user has failed three consecutive login attempts.
- The user has failed three consecutive attempts at answering challenge questions.
- The user has not logged in for a specific number of days based on the security community to which the application role has been assigned (e.g., Provider Security Community is 60 days).
- An EIDM Help Desk User has locked the account manually.

If your account is locked and you attempt to login, you are redirected to the **Unlock My Account** page.

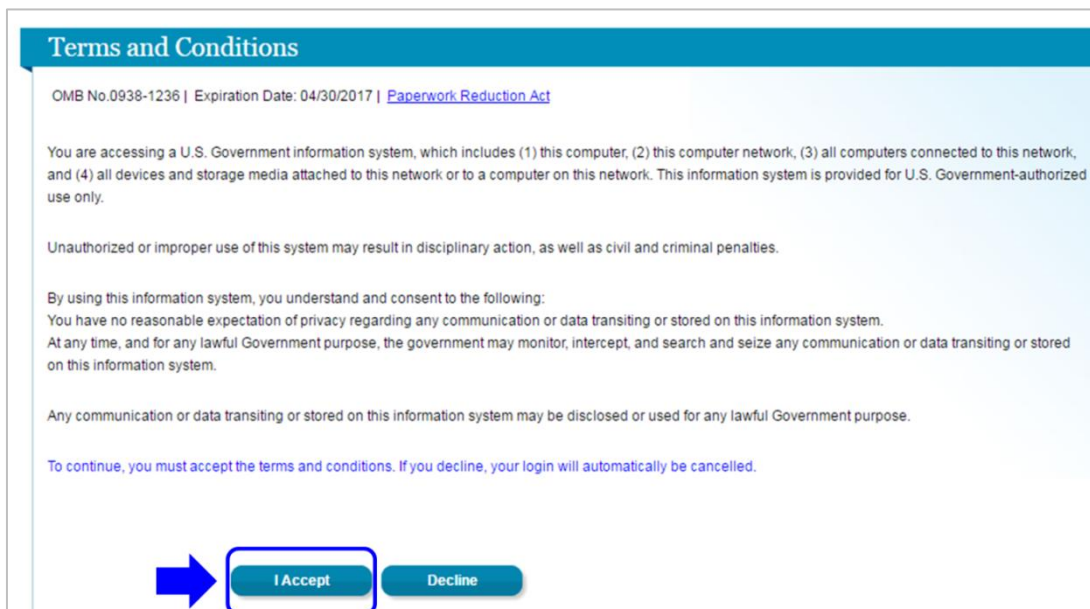
To unlock your account, **FOLLOW THESE STEPS:**

	Action
<b>Step 1</b>	Navigate to <a href="https://portal.cms.gov">https://portal.cms.gov</a> . The <b>CMS Enterprise Portal</b> page displays as illustrated below.

<b>Step 2</b>	Select <b>Login to CMS Secure Portal</b> .
---------------	--------------------------------------------

## Action

**Step 3** Read the **Terms and Conditions** and select **I Accept** to continue.



**Terms and Conditions**

OMB No.0938-1236 | Expiration Date: 04/30/2017 | [Paperwork Reduction Act](#)

You are accessing a U.S. Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only.

Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.


By using this information system, you understand and consent to the following:

You have no reasonable expectation of privacy regarding any communication or data transiting or stored on this information system.

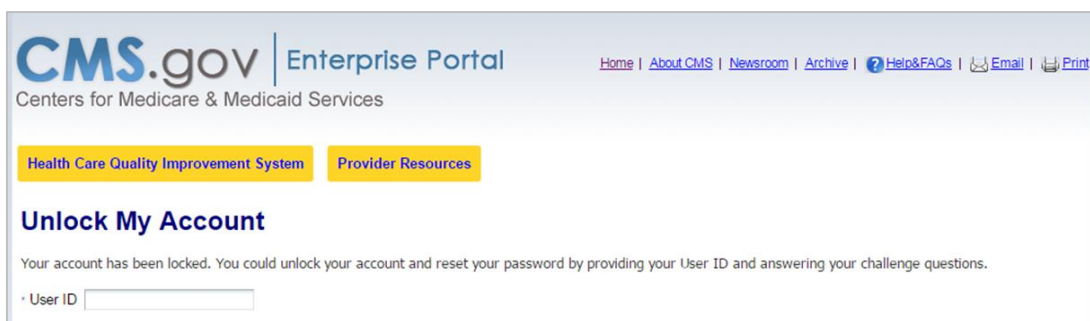
At any time, and for any lawful Government purpose, the government may monitor, intercept, and search and seize any communication or data transiting or stored on this information system.

Any communication or data transiting or stored on this information system may be disclosed or used for any lawful Government purpose.

To continue, you must accept the terms and conditions. If you decline, your login will automatically be cancelled.

 **I Accept** **Decline**

**Step 4** The **Unlock My Account** page displays.



**CMS.gov** | Enterprise Portal

Centers for Medicare & Medicaid Services

[Home](#) | [About CMS](#) | [Newsroom](#) | [Archive](#) | [Help&FAQs](#) | [Email](#) | [Print](#)

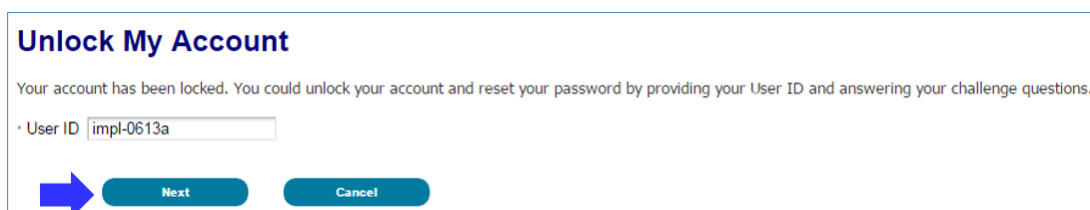
**Health Care Quality Improvement System** **Provider Resources**

**Unlock My Account**

Your account has been locked. You could unlock your account and reset your password by providing your User ID and answering your challenge questions.

User ID


**Step 5** Enter your **User ID** and select **Next**.



**Unlock My Account**

Your account has been locked. You could unlock your account and reset your password by providing your User ID and answering your challenge questions.

User ID

 **Next** **Cancel**



## Action

- Step 6** Provide the answers to the challenge questions displayed. Enter a new password and select **Next**.

- Step 7** Then **Unlock My Account** acknowledgement page displays. The page displays that your account has been unlocked successfully. Select **Next**.

The **CMS Enterprise Portal** page displays for you to log into your account.



## 8. Changing Your User Profile

This section provides assistance and basic step-by-step instructions for the following:

1. [Forgot Your User ID?](#)
2. [Forgot Your Password?](#)
3. [How to View Your Profile.](#)
4. [How to Change Your Password.](#)
5. [How to Change Your E-mail Address.](#)
6. [How to Change Your Security Challenge Questions and Answers.](#)
7. [How to Change Your Phone Number.](#)
8. [How to Change Your Address.](#)

### Forgot Your User ID?

The following are the basic step-by-step instructions on how to use the **Forgot User ID?** feature.

Action	
<b>Step 1</b>	Navigate to <a href="https://portal.cms.gov">https://portal.cms.gov</a> . The <b>CMS Enterprise Portal</b> page displays as illustrated below.

**Step 2** Select the **Forgot User ID?** link.



**Action**

**Step 3** Provide the information requested and select **Next** to continue.

**Note**

You may select **Cancel** at any time to exit out of the **Forgot User ID** process. New information or changes entered do not save.

Please enter the following information

\* First Name :


\* Last Name :

\* E-mail Address :

☒ U.S. Home Address ☐ Foreign Address

\* Zip code :

\* Date of Birth:




For CMS Portal login issues, please refer to the 'Help & FAQs' link located on the top of the page.  
For trouble with your EUA account, please visit the [Enterprise User Administration \(EUA\) page](#).

**Step 4** After selecting **Next**, the **Forgot User ID** acknowledgement page displays. The page displays that the information entered has been verified and an e-mail, with your User ID, has been sent to the e-mail address on record.

Select **OK** to close the page.

**Forgot UserId**

Your information has been successfully verified. An E-mail containing your User ID has been sent to the E-mail Address on record.

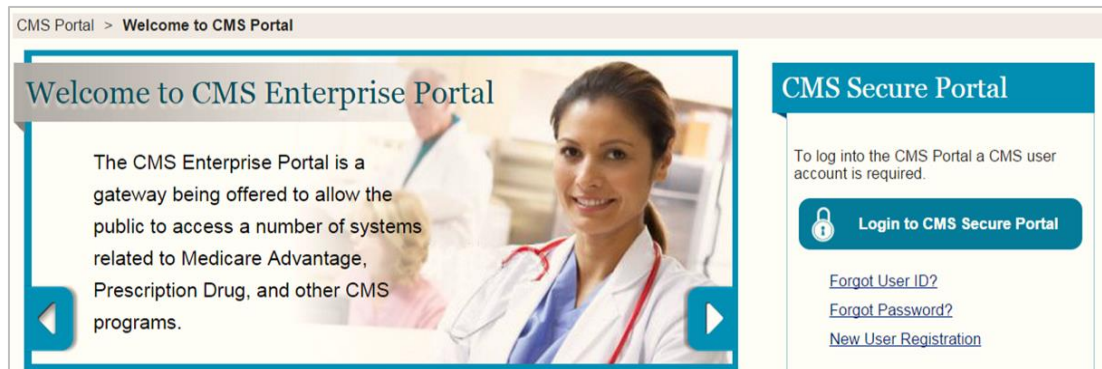


## Forgot Your Password?

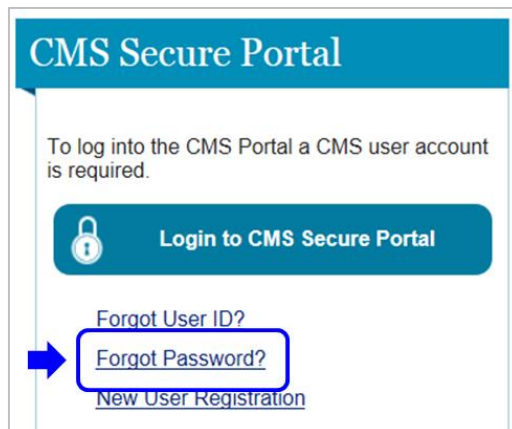
The following are the basic step-by-step instructions on how to use the **Forgot Password?** feature to create a new password.

### Action

- Step 1** Navigate to <https://portal.cms.gov>. The **CMS Enterprise Portal** page displays as illustrated below.



- Step 2** Select the **Forgot Password?** link.



- Step 3** Enter your **User ID** and select **Next** to continue.

## Action

**Step 4** Provide the answers to the challenge questions displayed.

Enter a new password. Re-enter the same password for “**Confirm Password**” and select **Next** to complete the Forgot Password process.

## Notes

- EIDM displays instructions on what you are required to include in your password.
- Some roles may require you to enter an 8-character password for your new password. For example, if you have a role in an application where a CMS 4-character Resource Access Control Facility (RACF) is used for identification and verification, you may have to create and enter an 8-character password for your new password. When you are required to enter an 8-character password, an error message displays when a password has been entered that is longer than 8 characters.

The screenshot shows a web interface for the 'Forgot Password' process. It is divided into two main sections, each indicated by a blue arrow on the left. The first section, titled 'Please answer the following challenge questions', contains three text input fields with the following prompts: 'What is the name of your favorite pet?', 'What was your favorite toy when you were a child?', and 'What is your favorite radio station?'. The second section, titled 'Please enter a new password', contains two text input fields labeled 'New Password:' and 'Confirm Password:'. At the bottom of the form are two buttons: 'Next' and 'Cancel'.

**Step 5** After selecting **Next**, the **Forgot Password** acknowledgement page displays. The page displays that the password has been changed and a confirmation e-mail has been sent to the e-mail address on record.

Select **OK** to close the page.

## Note

You may select **Cancel** at any time to exit out of the Forgot Password process. New information or changes entered do not save.

**Action****Forgot Password**

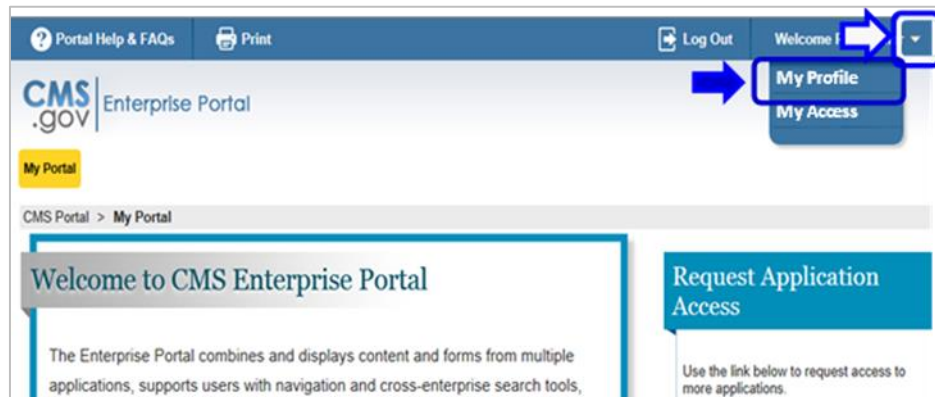
Your password has been successfully changed. A confirmation E-mail has been sent.

**OK**

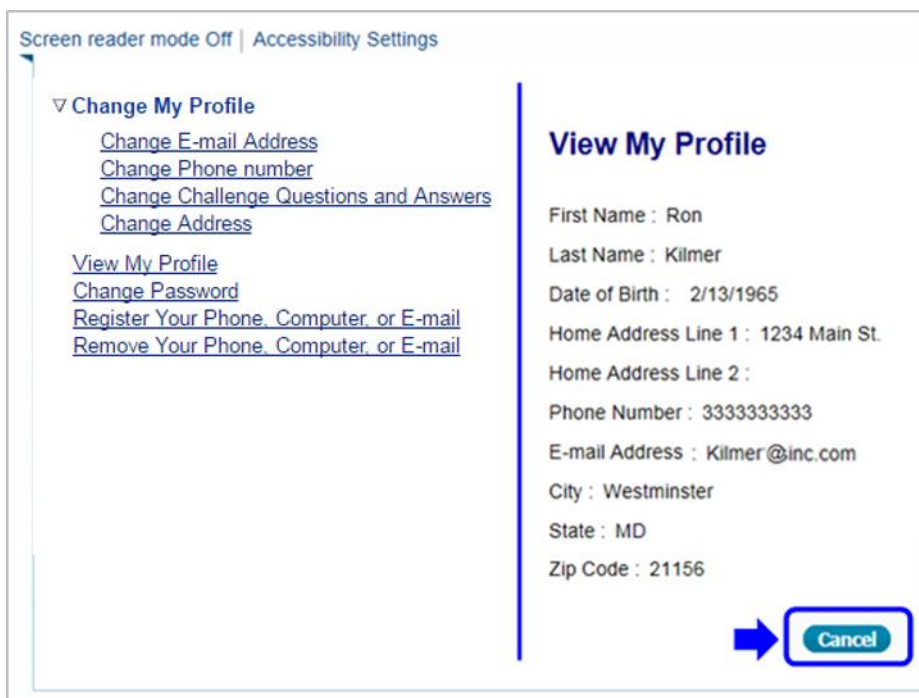
## How to View Your Profile

The following are the basic step-by-step instructions on how to use the **View My Profile** feature to view your profile information.

	Action
<b>Step 1</b> <a href="#">Log into the CMS Enterprise Portal.</a>  Select the down arrow icon that appears next to your name at the top of page. Then select <b>My Profile</b> from the drop-down list to continue.	



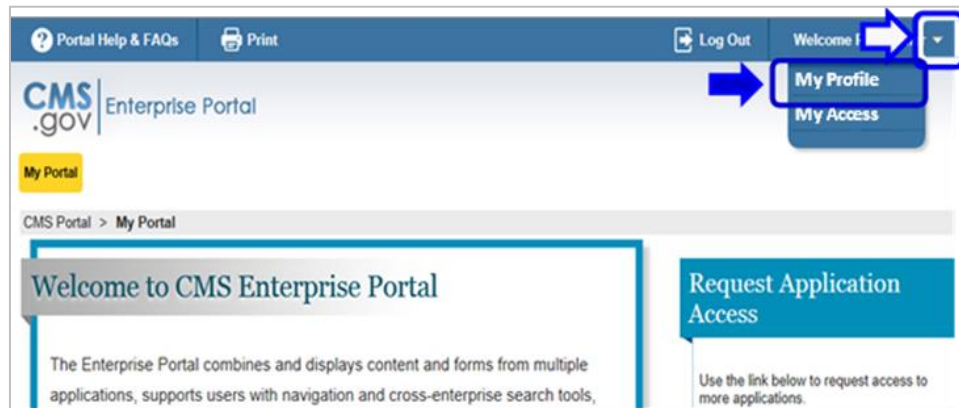
<b>Step 2</b> The <b>View My Profile</b> page displays.  After viewing your profile information, select <b>Cancel</b> to close the page.	
------------------------------------------------------------------------------------------------------------------------------------------------	--



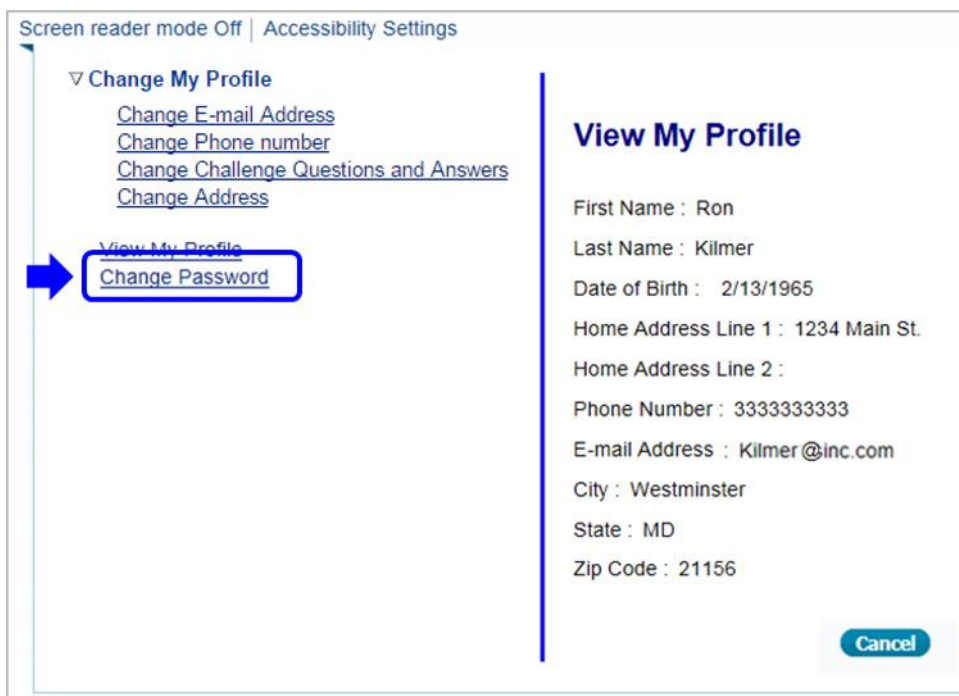
## How to Change Your Password

The following are the basic step-by-step instructions on how to use the **Change Password** feature to change your password.

	Action
<b>Step 1</b> <a href="#">Log into the CMS Enterprise Portal.</a>  Select the down arrow icon that appears next to your name at the top of page. Then select <b>My Profile</b> from the drop-down list to continue.	



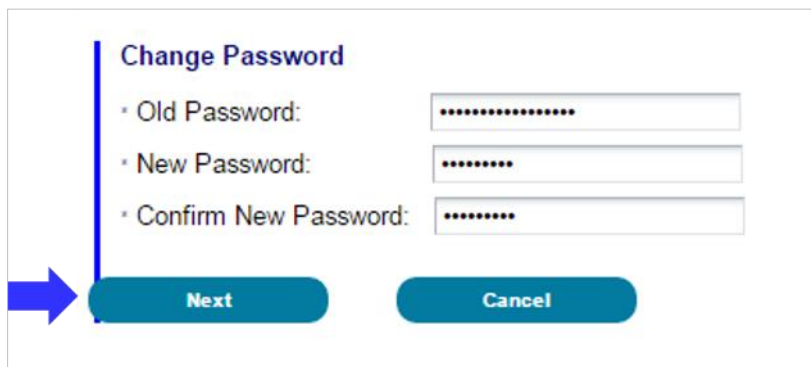
<b>Step 2</b> The <b>View My Profile</b> page displays.  Select <b>Change Password</b> .	
------------------------------------------------------------------------------------------------	--



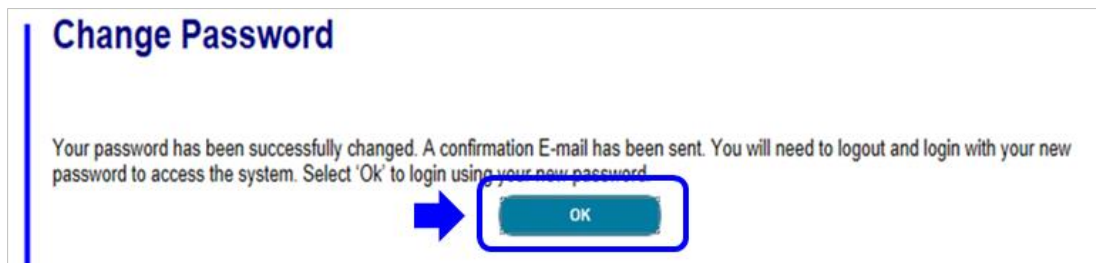
	Action
<b>Step 3</b>	<p>The <b>Change Password</b> page displays.</p> <p>Enter your old password.</p> <p>Create and enter a new password of your choice in the <b>New Password</b> field.</p> <p>Re-enter the same password in the <b>Confirm Password</b> field and select <b>Next</b> to continue.</p>

#### Notes

- EIDM displays instructions on what you are required to include in your password.
- Some roles may require you to enter an 8-character password for your new password. For example, if you have a role in an application where a CMS 4-character Resource Access Control Facility (RACF) is used for identification and verification, you may have to create and enter an 8-character password for your new password. When you are required to enter an 8-character password, an error message displays when a password has been entered that is longer than 8 characters.
- You may select Cancel at any time to exit out of the Change Password process. New information or changes entered do not save.



<b>Step 4</b>	<p>The <b>Change Password</b> acknowledgement page displays.</p> <p>It shows that the password has been changed, a confirmation e-mail has been sent to the e-mail address on record, and you need to logout and login with your new password.</p> <p>Select <b>OK</b> to close the page.</p>
---------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------





## How to Change Your E-mail Address

The following are the basic step-by-step instructions on how to use the **Change E-mail Address** feature to change your e-mail address.

**Step 1** **Action**  
[Log into the CMS Enterprise Portal.](#)

Select the down arrow icon that appears next to your name at the top of page. Then select **My Profile** from the drop-down list to continue.



**Step 2** The **View My Profile** page displays.

Select **Change E-mail Address**. Provide the answers to the challenge questions displayed.

Enter your new e-mail address in the **New E-mail Address** field and then re-enter the e-mail address in the **Confirm New E-mail Address** field.

Select **Next** to complete the Change e-mail process.

### Note

You may select **Cancel** at any time to exit out of the Change Password process. New information or changes entered do not save.

**Action**

**Step 3** The **Change E-mail Address** acknowledgement page displays.

It shows that the e-mail address has been changed. In addition, the system sends a confirmation e-mail to both the old and new addresses. Select **OK** to close the page.

**Change E-mail Address**

Your E-mail address has been updated successfully. Please note that, if you have chosen E-mail as a means to get the Security Code for Multi-Factor Authentication (MFA), then you will receive the Security Code in the updated E-mail address when selected during login.

**OK**

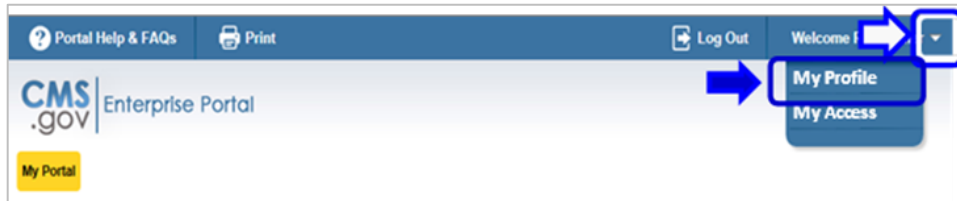
## How to Change Your Security Challenge Questions and Answers

The following are the basic step-by-step instructions on how to use the **Change Challenge Questions and Answers** feature to change your security challenge questions and answers.

### Step 1 **Action**

**Step 1** [Log into the CMS Enterprise Portal.](#)

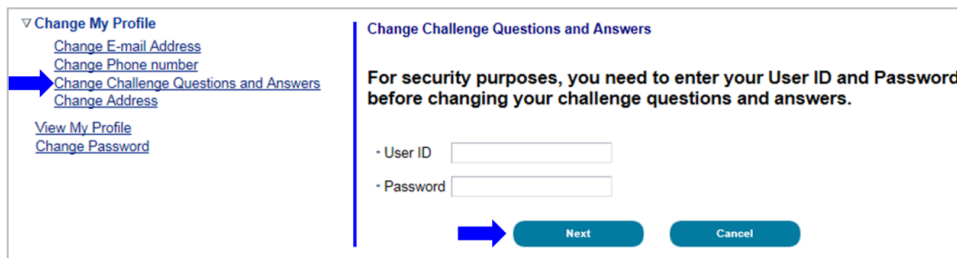
Select the down arrow icon that appears next to your name at the top of page. Then select **My Profile** from the drop-down list to continue.



### Step 2

The **View My Profile** page displays.

Select **Change Challenge Questions and Answers**. Enter your **User ID** and **Password** and select **Next**.



### Step 3

The **Change Challenge Questions and Answers** page displays.

Select a question and then provide an answer of your choosing. Continue until all three challenge questions have been selected and answered. Select **Next**.

#### Note

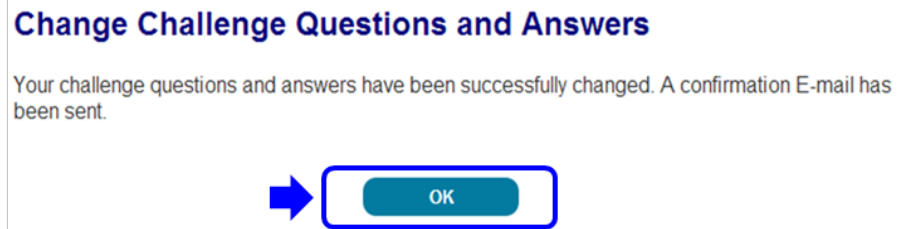
You may select **Cancel** at any time to exit out of the Change Challenge Questions process. New information entered do not save.

**Action****Step 4**

The **Change Challenge Questions and Answers** acknowledgement page displays.

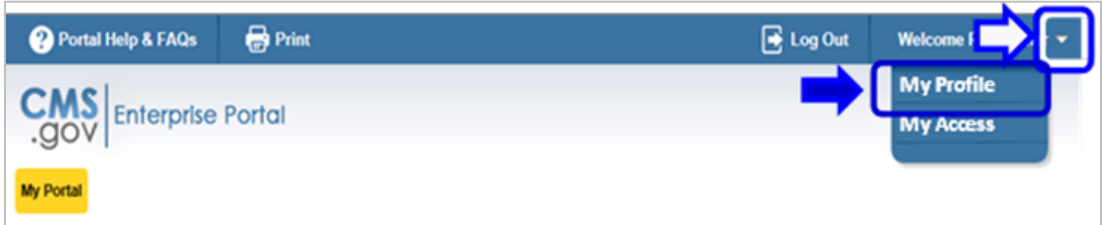
It shows that the challenge questions and answers have been changed and a confirmation e-mail has been sent to the e-mail address on record.

Select **OK** to close the page.

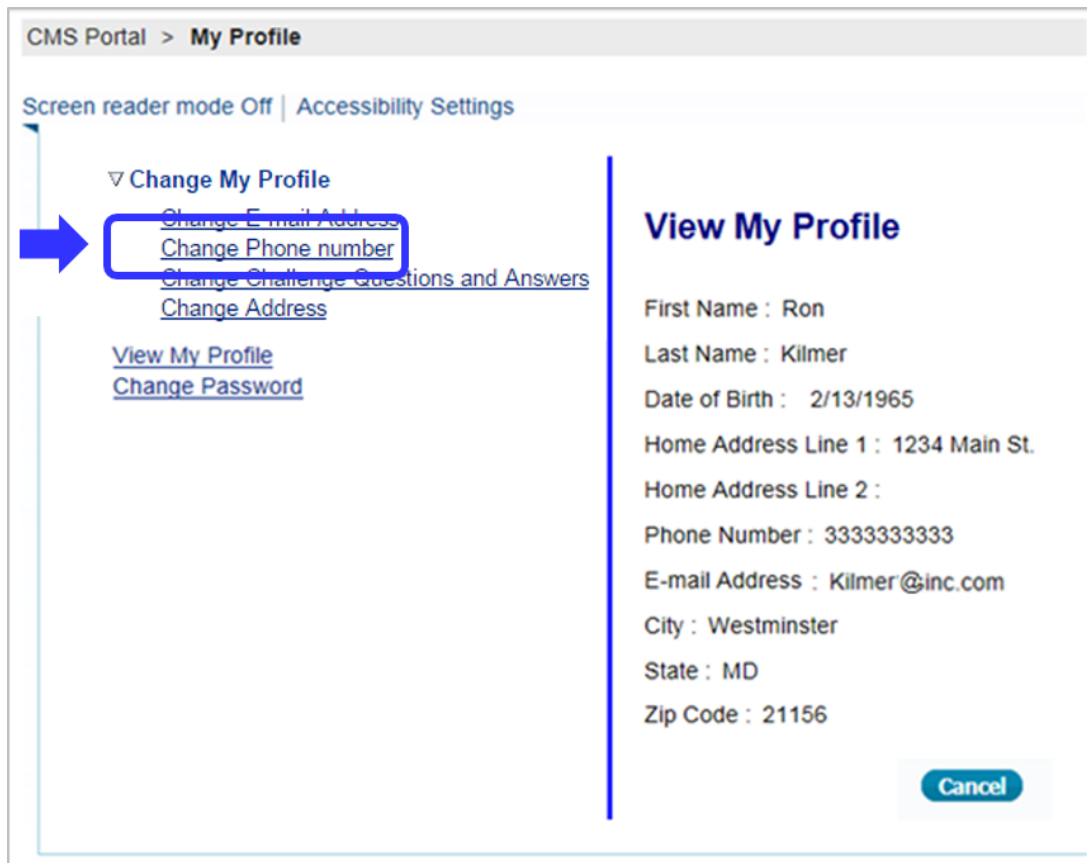


## How to Change Your Phone Number

The following are the basic step-by-step instructions on how to use the **Change Phone number** feature to change your phone number.

	Action
<b>Step 1</b>	<p><a href="#">Log into the CMS Enterprise Portal.</a></p> <p>Select the down arrow icon that appears next to your name at the top of page. Then select <b>My Profile</b> from the drop-down list to continue.</p> 

<b>Step 2</b>	<p>The <b>View My Profile</b> page displays.</p> <p>Select <b>Change Phone number</b>.</p>
---------------	--------------------------------------------------------------------------------------------



### Step 3 **Action**

The **Change Phone number** page displays.

The current phone number on record for you displays in the **Phone Number** field.

Provide the answers to all of the challenge questions displayed.

Enter your new phone number in the Phone Number field.

Select **Next** to continue.

#### Note

You may select **Cancel** at any time to exit out of the Change Phone number process. New information or changes entered do not save.

**Change Phone number**


**For security purposes, you need to answer all the challenge questions before changing the Phone Number.**

Question1: What is the name of your favorite pet?  
 \* Answer1:

Question2: What was your favorite toy when you were a child?  
 \* Answer2:

Question3: What is your favorite radio station?  
 \* Answer3:

\* Phone Number:



### Step 4 **The **Change Phone number** acknowledgement page displays.**

It shows that the phone number has been changed. In addition, the system sends a confirmation e-mail to the address on record.

Select **OK** to close the page.

## Action

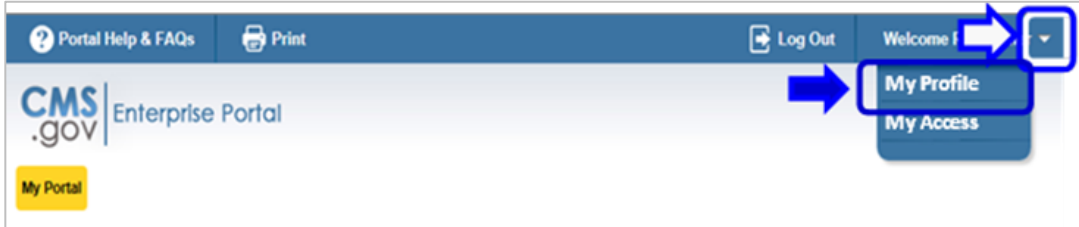
**Change Phone number**

Your Phone number has been updated successfully.

**OK**

## How to Change Your Address

The following are the basic step-by-step instructions on how to use the **Change Address** feature to change your address.

	Action
<b>Step 1</b>	<p><a href="#">Log into the CMS Enterprise Portal.</a></p> <p>Select the down arrow icon that appears next to your name at the top of page. Then select <b>My Profile</b> from the drop-down list to continue.</p> 

<b>Step 2</b>	<p>The <b>View My Profile</b> page displays.</p> <p>Select <b>Change Address</b>.</p> 
---------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------



	Action
<b>Step 3</b>	<p>The <b>Change Address</b> page displays.</p> <p>The current address on record displays in the <b>Address</b> field. Provide the answers to all of the challenge questions displayed.</p> <p>Enter your new address information in the <b>Address</b> field.</p> <p>Select <b>Next</b> to complete the <b>Change Address</b> process.</p>

**Note**

You may select **Cancel** at any time to exit out of the Change Address process. New information or changes entered do not save.

**Change Address**

**For security purposes, you need to answer all the challenge questions before changing the Address.**

Question1: What is the name of your favorite pet?  
 \* Answer1:

Question2: What was your favorite toy when you were a child?  
 \* Answer2:

Question3: What is your favorite radio station?  
 \* Answer3:

☒ U.S. Home Address ☐ Foreign Address  
 Enter your current or most recent home address, as it may be required for Identity Verification.

\* Home Address 1:


Home Address 2:

\* City:

\* State:

\* Zip Code:

Zip Code Extension:



<b>Step 4</b>	<p>The <b>Change Address</b> acknowledgement page displays.</p> <p>It shows that the address has been changed. In addition, the system sends a confirmation e-mail to the address on record.</p> <p>Select <b>OK</b> to close the page.</p>
---------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

## 9. User initiated Annual Certification

When a user's role request is approved, that role is granted to the user for one year. Continued use of the role must be approved, or "certified" each year by the designated approver for that role. Users have the option of notifying their approvers of the continued need for their roles by selecting the "Annual Certification" link on their profile page. Notifying your approver helps ensure that the annual certification of that role is completed in a timely manner and without interruption.

This process is initiated with an E-mail notification to the End Users:

1. An End User with a manually approved role will receive E-mail notifications on a biweekly basis on the first and fifteenth of every month if they have not submitted their role(s) for Annual Certification. The notifications begin when the certification due date is within 45 days of the e-mail notification period.
2. The E-mail notifies the End User that his role is due for Annual Certification along with the instructions to submit the role for recertification or to remove the role, if they no longer need the role.
3. The End User can login to EIDM and select the role they wish to recertify via the **My Annual Certifications View** page and submits the request. Upon submission of this request, the status of the role request is set to **Submitted** in the My Annual Certifications View page. The End User can also remove the role via the **View and Manage My Access** page.
4. The role status is updated to **Certified** when the approver recertifies the role.
5. The End User will receive an E-mail when the approver certifies/revokes the role or if no action is taken by the certification due date.

When a role fails certification, it is removed from the user's profile.

1. Manually approved roles can fail certification either because the Approver selected 'Revoke' for the user's role, or because the Approver took no action prior to the Annual Certification due date.
2. Validated roles can fail because the user provided data does not match the data in the trusted resource on the Annual Certification due date.

For more detailed instructions, please refer to Section 3: User Initiated Annual Certification in the EIDM Quick Reference Guide entitled: "*Completing Annual Certification*". EIDM Quick Reference Guides can be accessed through the CMS Enterprise Portal Help & FAQs page.

## 10. Account Review

In order to prevent the unnecessary accumulation of unused user accounts, CMS periodically checks whether the user accounts are still needed and are actively being used. If any account has a role associated to it, it is considered active and is not subject to account review. User accounts that do not have any roles associated to it may be removed based on the inactivity period described below.

Some important terms related to Annual Certification and Account Reviews include:

- **Inactive:** The User has not logged into either their Application or EIDM for 60 days or more.
- **Locked:** The User is prevented from logging in to any application. They may login to EIDM. A user's account is locked following 60 days of inactivity. To unlock an account, the User must login to EIDM, answer their challenge questions, and reset their password.
- **Deleted:** The User's account may no longer be used for any purpose and the User may register again. This occurs upon failing an Account Review when both of the following statements are true:
  - The User's account does not have a role in any application.
  - The User's account has been inactive for more than 360 days.

EIDM automatically performs calendar-driven account reviews in March and October as shown in the following table:

EIDM Checks Performed		Result	Next Steps/Action Taken
1.	Does the account have a role?	Yes	Account review passes. No further action is taken.
		No	Proceed to next step.
2.	Has the account been inactive for less than 180 days?	Yes	Account review passes. No further action is taken.
		No	Proceed to next step.
3.	Has the account been inactive for 180 days or more but less than 360 days?	Yes	Account review fails. User is notified by E-mail.
		No	Proceed to next step.
4.	Has the account been inactive for 360 days or more?	Yes	Account review fails. Account is deleted. User is notified by E-mail and may re-register in EIDM.

Table 1: Account Review Checks

### Account Fails Review at 180 Days

In the event an account fails review at 180 days, the account is locked and an E-mail is sent to the user. The following is a sample E-mail:

**From:** <[donotreply@cms.gov](mailto:donotreply@cms.gov)>  
**Date:** Fri, Nov 20, 2015 at 4:29 PM  
**To:** |  
**Subject:** Your CMS.gov Account has been locked.

Dear <First Name> <Last Name>,

The Centers for Medicare and Medicaid Services (CMS) periodically review CMS.gov User Accounts for compliance with CMS security policies.

Our records indicate that you do not have a role in any CMS.gov Application and you have not logged into CMS.gov for <number of days of inactivity> days or more. Due to this, your account, <User ID>, has been locked.

To unlock your Account, please login to CMS.gov using the link given below and follow the on-screen instructions.

If you are accessing CMS.gov from CMS Net, Go to <[CMS NET URL](#)>.  
 If you are accessing CMS.gov from the Internet, Go to <[Internet URL](#)>.

Thank you,  
 CMS.gov  
 Please do not reply to this system generated E-mail.

### Important Note

Locked users can unlock using the self-service function by answering the challenge questions that they set up at the time of registration and resetting their password.

## Account Fails Review at 360 Days

In the event that an account fails review at 360 days, the account is deleted and an E-mail is sent to the user. The following is a sample E-mail:

**From:** <[donotreply@cms.gov](mailto:donotreply@cms.gov)>  
**Date:** Fri, Nov 20, 2015 at 4:29 PM  
**To:** |  
**Subject:** Your CMS.gov Account has been deleted.

Dear <First Name> <Last Name>,

The Centers for Medicare and Medicaid Services (CMS) periodically review CMS.gov User Accounts for compliance with CMS security policies.

Our records indicate that you do not have a role in any CMS.gov Application and you have not logged into CMS.gov for <number of days of inactivity> days or more. Due to this, your account, <User ID>, has been deleted.

To regain access to CMS.gov and it's Applications you may register for a new Account by accessing CMS.gov using the link given below and selecting the New User Registration link.

If you are accessing CMS.gov from CMS Net, Go to <[CMS NET URL](#)>.  
 If you are accessing CMS.gov from the Internet, Go to <[Internet URL](#)>.

Thank you,  
 CMS.gov  
 Please do not reply to this system generated E-mail.

### Important Note

The E-mail includes instructions to regain access to the CMS Enterprise Portal by registering for a new user account.

The screenshot displays the CMS.gov Enterprise Portal. The top navigation bar includes links for Home, About CMS, News, and Help & FAQs (highlighted with a blue box and an arrow). Below the navigation bar, there are links for Health Care Quality Improvement System and Provider Resources. The main content area is titled 'CMS Enterprise Portal > FAQ' and contains a 'General' section with three questions and answers. Below this, there is an 'EIDM Users' section with four questions and answers. At the bottom of the page, there is a row of five links: User Guides, Quick Reference Guides (highlighted with a blue box and an arrow), Videos, FAQs, and Help Desk Information.

**CMS.gov Enterprise Portal**  
Centers for Medicare & Medicaid Services

Home | About CMS | News | **Help & FAQs** | Print

Learn about your [healthcare options](#) | Search CMS.gov

Health Care Quality Improvement System | Provider Resources

CMS Enterprise Portal > FAQ

General | EIDM | EUA | Browser Support | Alerts & Notifications

### General

- What is the CMS Enterprise Portal?**  
The CMS Enterprise Portal is a convenient single point of entry to numerous CMS applications, systems, and databases.
- Who is eligible to have a CMS User Account?**  
All US citizens who are over 18 years of age and have a valid US residential address are eligible to have a **CMS User Account**.
- Who do I contact for Portal Login issues?**  
CMS Portal login issues should be directed to your Application Help Desk.

General | EIDM | EUA | Browser Support | Alerts & Notifications

### EIDM Users

- What is CMS EIDM?**  
EIDM is the acronym for CMS' Enterprise Identity Management system which includes Identity Verification, Access Management, Authorization Assistance Workflow Tools, and Identity Lifecycle Management functions (i.e., Password Reset, Forgot User ID, etc.).
- What is a CMS EIDM User account?**  
An EIDM account ensures that only authorized/registered users can access protected information and systems through the CMS Enterprise Portal.
- I am new to CMS Enterprise Portal. How should I create my user account?**  
Once you are on the CMS Enterprise portal, click the 'New User Registration' hyperlink. You are required to enter your personal information and choose desired User ID/Password as per the guidelines provided. Once the details have been successfully entered in EIDM, the system will display a message confirming the creation of the user account.
- For more information, click on any of the following:**

User Guides | **Quick Reference Guides** | Videos | FAQs | Help Desk Information

# 11. Appendices

## Appendix A: Accessing EIDM in 508 Accessibility Mode

Section 508 is a federal law that requires agencies to provide people with disabilities equal access to electronic information and data comparable to those who do not have disabilities, unless doing so would impose an undue burden on the agency. The Section 508 standards are the technical requirements and criteria used to determine whether the agency is meeting the requirements of this law.

This section outlines the steps users can take to access EIDM in 508 Accessibility Mode.

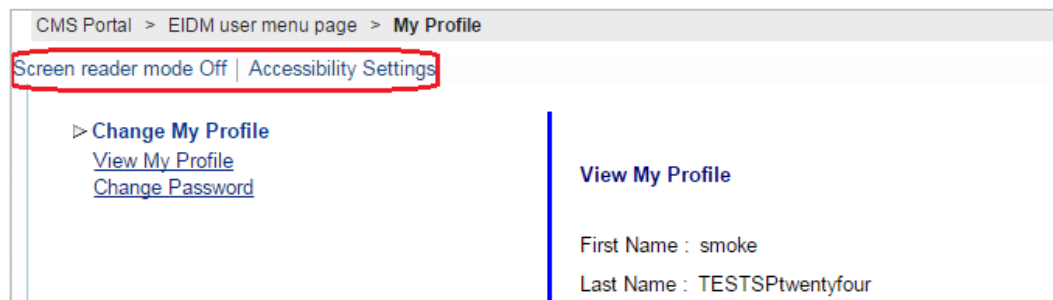
### Action

#### Step 1 [Log into the CMS Enterprise Portal](#)

Locate the **Welcome <First Name> <Last Name>** drop-down list at the top-right corner of the page and select **My Profile**.



#### Step 2 The 'View My Profile' page displays. Locate the "Screen Reader Mode [Off/On]" and "Accessibility Settings" links in the top-left corner.



#### Step 3 Click **Screen reader mode Off** to toggle it to **Screen reader mode On**.



#### Step 4 Click **Accessibility Settings** to access more options.



## Action

**Step 5** The 'Accessibility Preferences' page displays. Make your selections and click **OK**.

CMS Portal > EIDM user menu page > My Profile

**Accessibility Preferences**

**Edit Accessibility Settings**

Any setting must be made for each browser session.

☒ Screen reader ⓘ

☐ High contrast ⓘ

☐ Large fonts ⓘ

**OK** **Cancel**

## Appendix B: Application Help Desk Information

Application (Help Desk Name)	Phone	E-mail
<b>Agents and Brokers (FFM - A/B)</b> (XOSC)	855-267-1515	<a href="mailto:cms_feps@cms.hhs.gov">cms_feps@cms.hhs.gov</a>
<b>ASETT</b> (ASETT Help Desk)	703-951-6810	<a href="mailto:asett@actionet.com">asett@actionet.com</a>
<b>BCRS</b> (COB&R Help Desk)	888-268-6495	<a href="mailto:cobrhelp@strategichs.com">cobrhelp@strategichs.com</a>
<b>Bundled Payments EFT</b> (Bundled Payments Help Desk)	N/A	<a href="mailto:BundledPayments@cms.hhs.gov">BundledPayments@cms.hhs.gov</a>
<b>CERRS</b> (Cognosante Help Desk)	703-206-6199	<a href="mailto:servicedesk@cognosante.com">servicedesk@cognosante.com</a>
<b>Cisco WebEx SaaS</b> (WebEx Support)	410-786-3090 (Option 1)	<a href="mailto:OTS_WebEx@cms.hhs.gov">OTS_WebEx@cms.hhs.gov</a>
<b>COB</b> (MAPD Help Desk)	800-927-8069	<a href="mailto:mapdhelp@cms.hhs.gov">mapdhelp@cms.hhs.gov</a>
<b>Connexion</b> (CBIC Help Desk)	877-577-5331	<a href="mailto:CBIC.admin@palmettogba.com">CBIC.admin@palmettogba.com</a>
<b>CPMS</b> (XOSC)	855-267-1515	<a href="mailto:CMS_feps@cms.hhs.gov">CMS_feps@cms.hhs.gov</a>
<b>CSR</b> (MAPD Help Desk)	800-927-8069	<a href="mailto:mapdhelp@cms.hhs.gov">mapdhelp@cms.hhs.gov</a>
<b>DBidS/ DMEPOS</b> (CBIC Help Desk)	877-577-5331	<a href="mailto:CBIC.admin@palmettogba.com">CBIC.admin@palmettogba.com</a>
<b>ECRS</b> (EDI Help Desk)	646-458-6740	<a href="mailto:ECRSHelp@EHMedicare.com">ECRSHelp@EHMedicare.com</a>
<b>ELMO</b> (MAPD Help Desk)	800-927-8069	<a href="mailto:mapdhelp@cms.hhs.gov">mapdhelp@cms.hhs.gov</a>
<b>EPPE</b> (EPPE Help Desk)	844-377-3382	<a href="mailto:eppe@cms.hhs.gov">eppe@cms.hhs.gov</a>
<b>e-RPT</b> (MAPD Help Desk)	800-927-8069	<a href="mailto:mapdhelp@cms.hhs.gov">mapdhelp@cms.hhs.gov</a>
<b>ESD</b> (ESD Application Support)	TBD	TBD
<b>FCSO aka The Spot</b> (FCSO Help Desk)	855-416-4199	<a href="mailto:FCSOSpotHelp@FCSO.com">FCSOSpotHelp@FCSO.com</a>
<b>FFSDCS</b> (ASP Help Desk)	844-876-0765	<a href="mailto:aspHelpDesk@dcca.com">aspHelpDesk@dcca.com</a> <a href="mailto:CLFShelpdesk@dcca.com">CLFShelpdesk@dcca.com</a>



Application (Help Desk Name)	Phone	E-mail
<b>Gentran</b> (Gentran Support)	N/A	<a href="mailto:Gentran-support@cms.hhs.gov">Gentran-support@cms.hhs.gov</a>
<b>HDT</b> (MCARE/HDT Help Desk)	866-324-7315	<a href="mailto:mcare@cms.hhs.gov">mcare@cms.hhs.gov</a>
<b>HIOS</b> (XOSC)	855-267-1515	<a href="mailto:cms_feps@cms.hhs.gov">cms_feps@cms.hhs.gov</a>
<b>IC (Innovation Center)</b> (IBOSC and IC Help Desks)	844-711- CMMI (Option #1) 844-280-5628 800-381-4724	<a href="mailto:cjrsupport@cms.hhs.gov">cjrsupport@cms.hhs.gov</a> <a href="mailto:HHVBPquestions@cms.hhs.gov">HHVBPquestions@cms.hhs.gov</a> <a href="mailto:cpcplus@telligen.com">cpcplus@telligen.com</a>
<b>ISV</b> (ISV Help Desk)	N/A	<a href="mailto:ISV-Support@cms.hhs.gov">ISV-Support@cms.hhs.gov</a>
<b>MACPro</b> (MACPro Help Desk)	301-547-4688	<a href="mailto:MACPro_HelpDesk@cms.hhs.gov">MACPro_HelpDesk@cms.hhs.gov</a>
<b>MARx</b> (MAPD Help Desk)	800-927-8069	<a href="mailto:mapdhelp@cms.hhs.gov">mapdhelp@cms.hhs.gov</a>
<b>MCU</b> (XOSC)	855-267-1515	<a href="mailto:CMS_feps@cms.hhs.gov">CMS_feps@cms.hhs.gov</a>
<b>MDR</b> (MAPD Help Desk)	800-927-8069	<a href="mailto:mapdhelp@cms.hhs.gov">mapdhelp@cms.hhs.gov</a>
<b>MED</b> (EUS Help Desk)	866-484-8049	<a href="mailto:eussupport@cgi.com">eussupport@cgi.com</a>
<b>MLMS</b> (MLMS Help Desk)	N/A	<a href="mailto:MLMSHelp_Desk@cms.hhs.gov">MLMSHelp_Desk@cms.hhs.gov</a>
<b>MyCGS</b> (MyCGS Help Desk)	866-270-4909	<a href="mailto:cgs.dme.mac.email.inquiries@cgsadmin.com">cgs.dme.mac.email.inquiries@cgsadmin.com</a>
<b>Novitas</b> (Novitas Help Desk)	855-880-8424	<a href="mailto:WebsiteEDI@novitas-solutions.com">WebsiteEDI@novitas-solutions.com</a>
<b>Open Payments</b> (Open Payments Help Desk)	855-326-8366	<a href="mailto:OpenPayments@cms.hhs.gov">OpenPayments@cms.hhs.gov</a>
<b>Physicians Value aka PV</b> (PV Help Desk)	888-734-6433	<a href="mailto:pvHelp_Desk@cms.hhs.gov">pvHelp_Desk@cms.hhs.gov</a>
<b>PMDA</b> (PMDA Help Desk)	443-775-3226	<a href="mailto:pmda1115_cvp_help@cvpcorp.com">pmda1115_cvp_help@cvpcorp.com</a>
<b>PQRS</b> (QualityNet Help Desk)	866-288-8912	<a href="mailto:qnet-hd-support-queue@hcqis.org">qnet-hd-support-queue@hcqis.org</a>

Application (Help Desk Name)	Phone	E-mail
<b>PS&amp;R/STAR</b> (EUS Help Desk)	866-484-8049	<a href="mailto:eussupport@cgi.com">eussupport@cgi.com</a>
<b>QARM</b> (ESRD Help Desk)	866-288-8912	<a href="mailto:QNETSupport-ESRD@hcqis.org">QNETSupport-ESRD@hcqis.org</a>
<b>QMAT</b> (CEC Help Desk)	888-734-6433	<a href="mailto:ESRD-CMMI@cms.hhs.gov">ESRD-CMMI@cms.hhs.gov</a>
<b>Salesforce</b> (CMS Salesforce and Force.com Information Center)	888-734-6433 (Option 5)	<a href="mailto:CMMIForceSupport@cms.hhs.gov">CMMIForceSupport@cms.hhs.gov</a>
<b>SERTS</b> (XOSC)	855-267-1515	<a href="mailto:CMS_feps@cms.hhs.gov">CMS_feps@cms.hhs.gov</a>
<b>SERVIS</b> (XOSC)	855-267-1515	<a href="mailto:CMS_feps@cms.hhs.gov">CMS_feps@cms.hhs.gov</a>
<b>SHOP/SHIM</b> (SHOP Call Center/Support)	800-706-7893	N/A
<b>SLS</b> (SLS Support)	N/A	<a href="mailto:sls@navahq.com">sls@navahq.com</a>
<b>T-MSIS</b> (T-MSIS Help Desk)	N/A	<a href="mailto:T-MSIS_HelpDesk@cms.hhs.gov">T-MSIS_HelpDesk@cms.hhs.gov</a>
<b>UCM</b> (UCM Help Desk)	844-826-3375	<a href="mailto:ucmsupport@cms.hhs.gov">ucmsupport@cms.hhs.gov</a>
<b>VMS Client Letter</b> (GDIT Technical Help Desk)	443-275-6946 (Option 2)	<a href="mailto:THD@gdit.com">THD@gdit.com</a>
<b>zONE</b> (XOSC)	855-267-1515	<a href="mailto:CMS_feps@cms.hhs.gov">CMS_feps@cms.hhs.gov</a>

Table 2: Application Help Desk Information

## Appendix C: Acronyms

Acronym	Literal Translation
ACO	Accountable Care Organization
AIA	Automated Intervention Application
AO	Authorized Official
BAO	Backup Authorized Official
BCRC	Benefits Coordination & Recovery Center
CAHPS	Consumer Assessment of Healthcare Providers and Systems
CBA	Competitive Bidding Area
CBIC	Competitive Bidding Implementation Contractor
CGS	Celerian Group Administrators, LLC (collectively "CGS")
CHIP	Children's Health Insurance Program
CLFS	Clinical Laboratory Fee Schedule
CMS	Centers for Medicare & Medicaid Services
COB	Coordination of Benefits
CPC	Comprehensive Primary Care
CSR	Customer Service Representative
CWF	Common Working File
DBidS	DMEPOS Bidding System
DCCA	Data Computer Corporation of America
DME	Durable Medical Equipment
DMEPOS	Durable Medical Equipment, Prosthetics, Orthotics & Supplies
ECRS	Electronic Correspondence Referral System
EFT	Electronic File transfer
EIDM	Enterprise Identity Management
EP	Eligible Professional
EPOC	External Point of Contact (EPOC)
FCSO	First Coast Service Options (The SPOT)
FFSDCS	Fee for Service Data Collection System
GPRO	Group Practice Reporting Option
GUI	Graphical User Interface
HDT	HIPAA Eligibility Transaction System (HETS) Desktop
HETS	HIPAA Eligibility Transaction System

Acronym	Literal Translation
<b>IDP</b>	Identity Proofing
<b>IVR</b>	Interactive Voice Response
<b>LBN</b>	Legal Business Name
<b>LOA</b>	Level of Assurance
<b>LSA</b>	Local System Administrator
<b>MA</b>	Medicare Advantage
<b>MAC</b>	Medicare Administrative Contractor
<b>MAPD</b>	Medicare Advantage - Prescription Drug
<b>MARx</b>	Medicare Advantage and Prescription Drug System
<b>MCO</b>	Medicaid Managed Care Organization
<b>MDR</b>	Medicaid Drug Rebate
<b>MED</b>	Medicare Exclusion Database
<b>MFA</b>	Multi-Factor Authentication
<b>MMP</b>	Medicare and Medicaid Plan
<b>MSP</b>	Medicare Secondary Payer
<b>NPI</b>	National Provider Identifier
<b>OOW</b>	Out-of-Wallet
<b>OTP</b>	One-time Password
<b>PDE</b>	Prescription Drug Event
<b>PDP</b>	Prescription drug Plan
<b>POS</b>	Point Of Service
<b>POS</b>	Point of Sale
<b>POSFE</b>	Point-of-Sale Facilitated Enrollment
<b>PQIP</b>	Physician Quality Initiatives Portal
<b>PQRS</b>	Physician Quality Reporting System
<b>PS&amp;R</b>	Provider Statistical and Reimbursement
<b>PTAN</b>	Provider Transaction Access Number
<b>PV</b>	Physician Value
<b>PY</b>	Payment Year
<b>QRUR</b>	Quality and Resource Use Report
<b>RACF</b>	Resource Access Control Facility
<b>RAPS</b>	Risk Adjustment Processing System
<b>RIDP</b>	Remote Identity Proofing

Acronym	Literal Translation
SHIP	State Health Insurance Plans
SMS	Short Message Service
SPAP	State Pharmacy Assistance Programs
SR	Service Request
SSN	Social Security Number
STAR	System for Tracking Audit and Reimbursement
TIN	Taxpayer Identification Number
TT	Trouble Ticket
UI	User Interface
VMS	ViPS Medicare System
XLC	eXpedited Life Cycle
XLS	Microsoft Excel Workbook

Table 3: Acronyms